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AUTHOR Crawford, Dorothy; And Others  
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## ABSTRACT

Project MEAL (Model for Employment and Adult Living) provides a program for post-high-school preparation of unemployed learning-disabled young adults. Its strategies and interventions can be adopted for use with learning-disabled individuals still in school and with individuals having other handicapping conditions. The program's target population is handicapped persons who are exiting or have recently exited from secondary schools and are unprepared for competitive employment or independent living. The program provides a comprehensive model of training and support services which link members of the target population to available community training/education programs and services. Project MEAL strategies call for creation of a service delivery model that includes: linkages between local education agencies and providers of services for learning-disabled adults; provision of educational and vocational career assessment; assistance for clients in developing job readiness skills, specific job skills, and independent living skills; and job placement services. Described in this final report and replication manual are Project MEAL's referral and intake procedures; assessment procedures; curriculum and instructional program; development of Individualized Education, Training, and Employment Plans; tutoring services; financial planning; job development; job tracking; problems encountered while conducting the project; the case management system; and an evaluation of the project's effectiveness. (JDD)

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**PROJECT MEAL**  
**(Model for Employment and Adult Living)**

**Final Report and Replication Manual**

**Dorothy Crawford**  
**Chief Administrator**  
**Research and Development Training Institutes, Inc.**  
**Project Director**

**Robert Crawford**  
**Program Director**

**Larry A. Faas, Ph.D.**  
**Project Evaluator**

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## Chapter 1

### Transition: A Major Problem For Learning Disabled Adults

More than one-half of the graduates of the nation's high school programs for the learning disabled fail to make a successful transition from school to employment (Will, 1984). Each year these jobless individuals join the 67% of all handicapped Americans between ages 16 and 65 who are unemployed (Rusch and Phelps, 1987). Will cited figures in 1984 from the 1979 census that indicated 50 to 80 percent of the working age handicapped adults are jobless. A 1983 U. S. Commission on Civil Rights paper and a 1982 U. S. Census document report that up to 80 percent of the working age adults identified as disabled were jobless (Will, 1984). The percentage becomes even more devastating when the jobless rates of handicapped youths between 14 and 21 are examined. Rusch and Phelps reported in 1986 that 67 percent of those within this age range are unemployed. Unemployment, low wages, and low job satisfaction are persisting problems for members of this group (Meehan and Hodell, 1986).

Handicapped adults who are unemployed after leaving high school become consumers of public resources rather than contributors. Depending on the severity of the disability, the annual costs borne by taxpayers for sheltered workshops, adult day care services, and income transfer programs that support the unemployed can run as high as \$12,000 per person annually (Phelps, Blanchard, Larkin and Cobb, 1982; Walls, Zavlocki and Dowler, 1986). The economic benefits of placing and supporting these individuals in competitive employment include a larger tax base, greater productivity capacity for the nation, and significant reduction in social costs (Copa, 1984, Rusch, 1986; Wehman, Hill, Goodall, Cleveland, Brooke and Pentecost, 1982). Will reported in 1984 that a White House Study Group has estimated 8 percent of the gross national product goes to support dependency.

The transition of handicapped youth from school to work and other facets of community living has become a critical concern for parents, professionals, and policy makers (Johnson, Bruninks and Thurlow, 1987). These concerns are reflected in the Education for Handicapped Children Amendments of 1983, which focus specific attention on the need to improve the scope and quality of transition services and service planning efforts.

The available evidence and collective experiences of families and practitioners suggest that current transition efforts are far from optimal (Johnson, Bruninks and Thurlow, 1987). Edgar indicated in 1987 that the secondary curriculum for special

education students appears to have very little, if any impact on their eventual adjustment to community life. With few exceptions, schools have failed to effectively prepare the learning disabled for the transition from school to employment.

### The Link Between Learning Disabilities and Juvenile Delinquency

A study of the relationship between learning disabilities and juvenile delinquency was conducted by the Association for Children with Learning Disabilities-Research and Development (ACLD-R&D) Project. The following results were reported in 1982 at the conclusion of this study which was funded by the National Institute of Juvenile Justice and Delinquency Prevention (Crawford, 1982).

1. The evidence for the existence of a relationship between learning disabilities and self-reported delinquency was statistically significant.
2. LD adolescents reported a significantly higher frequency of violent acts.
3. LD was strongly related to official delinquency. The probability of being officially delinquent (on a national measure) was 9 out of every 100 LD adolescent males compared to 4 of every 100 non-LD adolescent males. The chances of being adjudicated delinquent were 220% greater for LD adolescents than for their non-LD peers.
4. The chance that a learning disabled and a juvenile delinquent adolescent would be taken into custody was the same.
5. The 32% incidence of learning disabilities in the adjudicated group indicates that a substantial proportion of the officially delinquent group is also handicapped with LD.
6. The greater delinquency of LD youths could not be attributed to socio-demographic characteristics or a tendency to disclose socially disapproved behaviors.
7. The data indicated that LD contributed to increases of delinquent behavior both directly and indirectly through school failure.
8. LD juveniles had higher possibilities of arrest and adjudication than those without LD.
9. There was no difference in the rate of incarceration among adjudicated LD and non-LD adolescents.

10. As non-delinquent boys advance through their teens, those with LD experience greater increases in delinquent activities than those who are not LD.

These data indicate that LD youths are a "high risk" group that is in greater need of services than their non-LD counterparts. While only a relatively small proportion of the adolescent population is affected by LD, LD appears to be one of the important causes of delinquency.

A second investigation of the relationship between learning disabilities and juvenile delinquency and the effectiveness of the ACED-R&D remediation program was conducted by the National Center for State Courts (NCSC). This program provided supplemental remedial instruction to adjudicated learning disabled delinquents who were either attending high school or high school age. The following findings were reported following this study (Dunivant, 1982).

1. There was a significant improvement in academic performance with 55 to 65 hours of remedial instruction during one school year.
2. There was a dramatic decrease in delinquency with at least 40-50 hours of instruction. The instruction was found to be significantly effective in preventing or controlling future delinquency.
3. A major factor in preventing delinquency was not academic skill improvement but seemed to be due to the nature of the relationship between adolescents and the LD specialists.
4. The model of instruction did significantly improve LD/JD adolescent's academic performance with reduced delinquent activity. It did not substantially change school attitudes.

Unfortunately widespread failure to identify learning disabilities among adolescents and the lack of widespread provision of the remediation program used in this study with the intensity needed to make a difference continues to result in the exit of large numbers of LD adolescents from our high schools who are not able to make a successful transition to employment. Faas (1987) reported that 22% of the chronically unemployed LD adults in his study of transition problems were not identified until after exiting high school.

### The Project MEAL Model

The Project MEAL model described in the following chapters provides an effective program for the post high school preparation of the unemployed learning disabled young adult population for sustained employment. It also provides many strategies and interventions that can be adopted and used effectively in the public schools with members of the learning disabled population. These procedures are also well suited for use with those who have other handicapping conditions or who are members of other "at risk" populations.

## Chapter 2

### The Project MEAL Model

(Model for Employment and Adult Living)

Project MEAL developed and field tested a model program which, with the assistance of a wide spectrum of cooperating agencies, and effectively transitioned unemployed learning disabled adults who had recently exited from school. This model provides a comprehensive program of training and support services which link certain handicapped persons who leave the secondary schools unprepared for competitive employment or independent living to available community training/education programs and services. This chapter includes an overview of the Project MEAL Model and a brief introduction to each of its components. These components are discussed in greater depth in the chapters which follow.

#### Project Goal

The primary goal of Project MEAL was to develop a model which effectively facilitates the successful transition for learning disabled adolescents and young adults from school to sustained employment in jobs which are commensurate with their capabilities.

#### Project Strategies

Development of Project MEAL strategies called for creation of a service delivery model that includes:

1. Linkages between local education agencies and providers of services for learning disabled adults.
2. Provision of educational and vocational career assessment.
3. Development of an Individualized Education Training and Employment Plan (IETEP) for each client served.
4. Development and provision of an instructional sequence that assists project clients in developing:
  - a. Job readiness skills.
  - b. Specific job skills and competencies.
  - c. Independent living skills.
5. Improvement of functional academic levels.



6. Development of job and transportation banks.
7. Provision of job placement and on-the-job tracking.
8. Ongoing evaluation and improvement of the model.

#### Target Population

The target population served by Project MEAL included exiting or recently exited high school students who had been identified by a certified psychologist as learning disabled; who were eligible for vocational rehabilitation services due to the nature of their handicap; and who did not possess the knowledge, abilities, attitudes and/or skills needed for gainful employment and independent adult life.

#### Project MEAL Dimensions

The life skills training approach used in the Project MEAL service delivery model includes the following four dimensions:

1. Receiving referrals from cooperating agencies and parents and conducting screening and preliminary assessment to determine client needs and eligibility for the program.
2. Enrollment in an eight week core training program that provides preparation for independent living, job readiness skills, academic tutoring (when needed), and initial job placement and work experience.
3. Comprehensive vocational assessment followed by technical instruction and job specific skills designed to increase the client's level of competence and employability.
4. Job placement commensurate with capabilities, with ongoing support services in the form of job tracking, and assistance in upgrading their job levels and living independently.

#### Linkage Development

Development of linkages was an important part of Project MEAL's activities. Formal linkages were developed between the R&D Training Institutes, Inc., and the Maricopa Skill Center, a division of Rio Salado Community College, the Arizona State Division of Vocational Rehabilitation, and Southwest Business Industry and Rehabilitation Association (SWBIRA). Development of linkages with representatives of secondary school training programs for learning disabled adolescents was also an important project component.

Linkage development emphasized facilitation of maximum communication between agencies that provide services for learning disabled adolescents and young adults. These linkage activities focused upon development of the relationships, understandings, and sense of cooperation that are needed to provide a continuum of services and insure a smooth transition from high school to post-school employment.

### Screening and Intake

Each prospective Project MEAL client was interviewed and screened by the program director prior to admission. This procedure included a review of the individual's educational and employment history and psychological and medical reports. Communication with the Division of Vocational Rehabilitation Counselor or a representative of the referring agency was a key part of this program component. Other factors that are reviewed at this time include the prospective client's legal history, age, and motivation. Financial responsibility (DVR, Pell Grants, SSI, JTPA, parents, etc.) is reviewed and established at the time of intake. Housing arrangements and the need for special provisions such as medication and counseling are also reviewed at this time. A key factor in determining a client's eligibility for admission to the program is determination that the person being considered for admission to the program is motivated or can be motivated to make an effort to develop the skills, attitudes and habits needed to become employable.

### Assessment Team Review and Evaluation

Each applicant for admission to the program was reviewed by the Project Assessment Team when possible. This review included an in-depth examination of prospective client's psychiatric history, vocational history, educational history and psychoeducational test data. The Assessment Team played a key role in determining applicant eligibility for admission to the program. The Assessment Team also identified areas in which additional assessment was needed. Members of the Assessment Team performed these evaluations or asked the agency making the referral to supply this data prior to the determination of eligibility.

### Development of an IETEP

An Individualized Education, Training and Employment Plan (IETEP) was developed for each project MEAL client. Development of a client's IETEP begins with a review of his or her present performance levels. Included is an examination of the client's employment history and vocational status, academic skills (strengths and weaknesses), personality/social adjustments (strengths and problems or vulnerable areas), modality/learning style preference (strengths and weaknesses), life skills/work-related behaviors and attitudes (strengths and areas needing

attention), vocational interests and dislikes, vocational skills and limitations, and other factors that need to be considered.

A listing of program recommendations that describes the client's need for additional evaluation, support services (psychotherapy, physical therapy, special transportation, etc.) and modifications which are needed in instructional materials, procedures and supervision is included in each IETEP.

Also included in each IETEP is a listing of short and long-range program goals and a designation of who is responsible for each project component.

### Core Training Program

Each client admitted to Project MEAL was enrolled in an eight week core training program. This 240 hour program concentrated upon four areas of skill development.

Area 1. Grooming and Attire - Project clients receive instruction and practice in hair styling, skin care, makeup, body care and physical fitness as part of the activities included in this area. They engage in purchasing and maintaining a wardrobe on a limited budget.

Area 2. Personal and Social Development - Group role playing activities designed to promote the ability to express and receive criticisms, share feelings, and engage in other interpersonal communications in the workplace are emphasized in this area. Clients are trained to be accountable for their lives, and responsible for positive/negative results that are a consequence of their actions. Clients are placed in structured leadership roles where they are responsible for others' performances as well as their own to further reinforce acceptable/appropriate behavior from a management perspective. This includes how to work together as they plan meals, class assignments, housekeeping and group activities.

Area 3. Financial Planning/Transportation - Instruction designed to assist clients with the development of skills in financial planning, budgeting, checking and savings accounts, reading telephone and utility bills. Obtaining credit and problems associated with installment buying are examined. Clients are taught how to read bus schedules and secure suitable transportation to work.

Area 4. Practical Law - Instruction in this area assist clients in developing their legal rights and responsibilities. Contracts, warranties, rights and duties of landlords and tenants, categories of crimes, selective service laws, need for proper receipts and records, and procedures used to collect bad debts are discussed.

Area 5. Independent Living - Instruction in this area to assist the clients in developing skills in home management. Included is the planning, purchasing and preparation of appropriate meals, time management, living with others, and finding appropriate housing. The independent living component of Project MEAL is an ongoing part of the program that involves systematic client follow-up for a four to six month period following completion of the core training program.

Area 6. Job Training and Placement - Instruction in this area emphasizes the development of job-related skills. Clients are taught how to organize their resumes into an understandable story which they can easily relate to others. Videotaped practice interviews are conducted to provide the clients with experience and confidence in situations which simulate ones that they must face while securing and maintaining a job. Clients are provided with employment job training that shows them exactly what is expected on the job. Finally, each client is placed in an entry-level job with the support of regular tracking to insure that the client's job status remains steady.

#### Vocational Evaluation

Each Project MEAL client received a complete comprehensive vocational evaluation at the Maricopa Skill Center. This evaluation examined the client's vocational interests, aptitudes, and potentials in a variety of areas, and makes recommendations regarding the client's need for further training.

#### Residential Option

R&D Training Institutes operate a 44 unit apartment complex which was used to provide a residential living option for Project MEAL clients. This option makes it possible for Project clients to practice the independent living skills that are needed to function successfully without continuing to be dependent upon their parents or other family members. It provides clients with an opportunity to apply content of the independent living instruction on a daily basis. Clients are taught how to shop for their own food, prepare their own meals, do their own laundry, and select and care for their own wardrobes. This option also provides clients with experience in practicing human relations skills required for successful living with one or more other young adults.

#### Tutorial Assistance

Tutorial services were provided for Project MEAL participants on an as-needed basis. Specific remediation was designed and provided for individuals who were functioning at a level which

might impede their ability to make a successful transition from school to independent living and optimal employment.

### Initial Job Placement

Each Project MEAL client was placed on a job as soon as his or her performance in the core training program indicated sufficient readiness. These entry-level placements provide an important opportunity for clients to practice skills that are being taught in Project classrooms. Initial placements included jobs in fast-food service, custodial services, nursing homes, the hotel-resort industry, airport security services, and airlines food preparation kitchens.

### Financial Planning

The income received by clients during their initial job placement provided them with funds that in turn became the subject of financial planning assistance, which was available for each client. This assistance included classroom instruction in budgeting, clothing selection, food selection and purchasing, savings, etc. Each participating client met with the financial planning instructor on a weekly basis to review his or her budget and plan for the following week. A number of clients established savings accounts and were able to make significant progress in moving toward financial independence.

### Job Development

Development of a listing of possible jobs begins for the clients as soon as they enter the core training program. Development of this plan involves researching and making contacts with a variety of employers who might have jobs that match the individual client's interests and aptitudes.

### Vocational Training

Each Project MEAL client was considered to be a candidate for job specific skill training at the Maricopa Skill Training Center. This center, a division of Rio Salado Community College, offers the following job skill training programs:

- A. Auto body repair and paint (24 weeks)
- B. Business/office specialized skills (26 weeks)
- C. Communications installer technician, electronic trades (12 to 16 weeks)
- D. Cashier sales (15 weeks)
- E. Electronics fabrication/wire harness assembly (15 weeks)
- F. Food preparation and service (26 weeks)
- G. Health occupations (12 to 40 weeks)
- H. Home operations management education (12 to 16 weeks)

- I. Machine trades precision sheet metal (16 weeks)
- J. Meat cutting (26 weeks)
- K. Mechanical maintenance (6-12 weeks)
- L. Welding (26 weeks)

A member of the Project MEAL staff spent part of several days each week with clients who were receiving training at the Maricopa Skill Center. This time was devoted to monitoring the progress of the clients who were enrolled in the vocational training component. Clients who were not eligible for placement at the Maricopa Skill Center were provided with other appropriate training experiences, such as on-the-job training (OJT).

#### Long-Range Job Placement

Each Project participant's job placement was formally reviewed following completion of the core training program, and again after completion of vocational skill training. This review focused on the possibility of upgrading the client's job placement so that it would be commensurate with his or her advancing experience and level of preparation.

#### Job Tracking and Follow Up

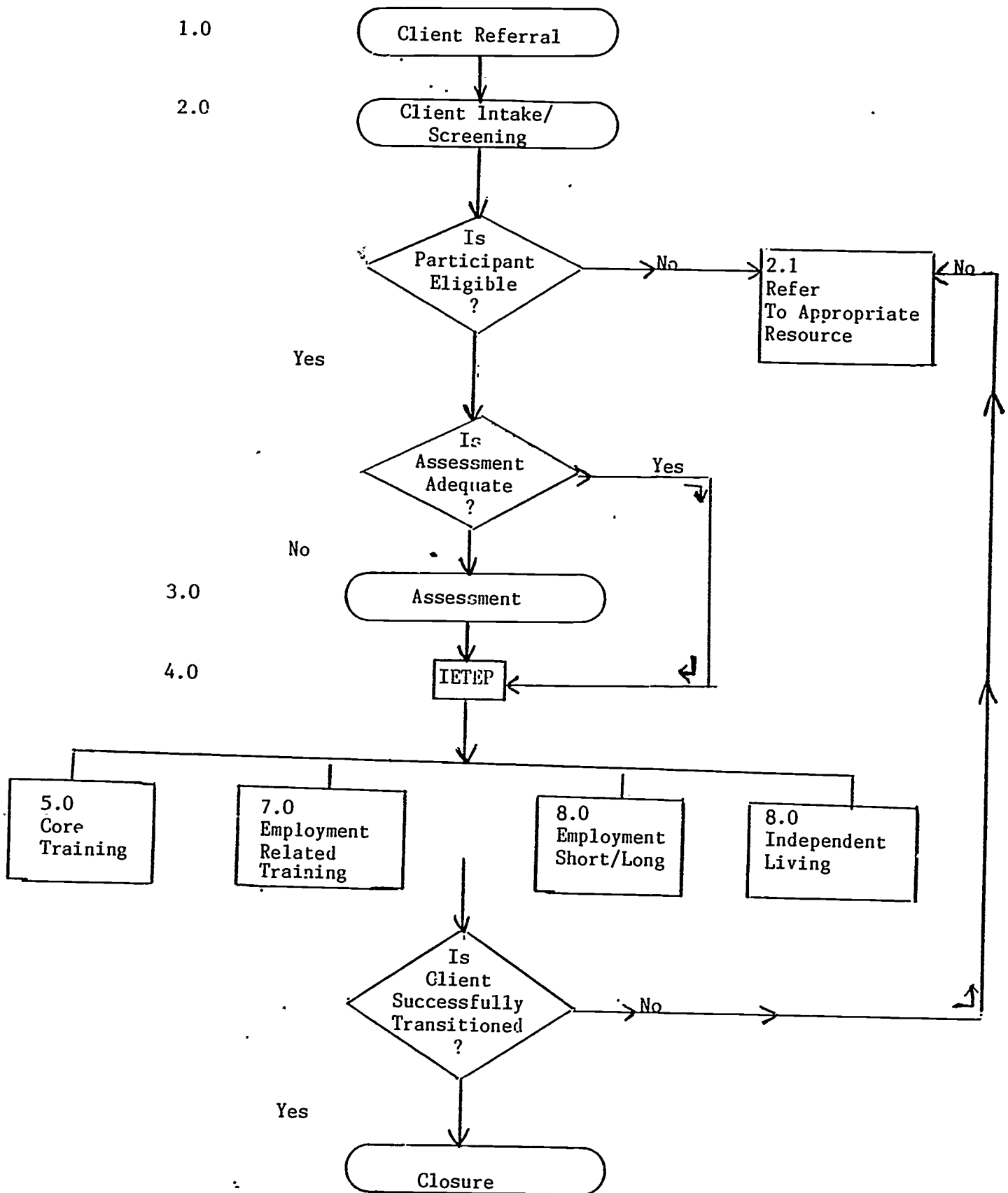
Regular contact with the employers of Project MEAL clients was an important part of the model. Information gathered during these contacts make it possible to make adjustments in the instructional program and to provide immediate job counseling that helps facilitate the clients' continued employment and periodic upgrades in their employment.

Each of the Project MEAL components and the effectiveness of the model are discussed in the chapters which follow. This discussion is offered as an aid to those who may want to replicate this model or portions of it.

#### Participant Progress Through Project

The movement of a client through Project MEAL is shown on the Participant Progress Chart which appears on the following page. This chart serves as a tool which can be used to quickly determine the point in the program the client has reached and the services that are currently needed or which will soon be needed.

TABLE 4  
PARTICIPANT PROGRESS CHART





## Chapter 3

### Referral and Intake

Inquiries and referrals for possible admission to Project MEAL came from a variety of cooperating agencies and individuals. The first contact with R&D Training Institutes personnel was usually in the form of a telephone call to the Program Director. A record of this inquiry is entered on the Log of Prospective Clients form that appears on the following page. The prospective client was invited to visit the R&D Training Institutes and an appointment for this visit was scheduled.

This visit made it possible for the Program Director to meet the prospective client face to face. It also provided the prospective client with an opportunity to meet one or more staff members and to become acquainted with the services and training offered by Project MEAL. At this time the program of services offered and what is expected of clients who participate in the project was explained in depth to the prospective client and whoever may have accompanied him or her. The face to face contact during this visit provided an opportunity for answering whatever questions the client, parents or representatives from the referring agency had. One of the most important aspects of this initial face to face interview was the opportunity to size up the prospective client and to informally assess the person's level of motivation and readiness to develop the behaviors, attitudes and skills needed to make a successful transition into sustained employment.

The pre-admission visit and interview also made it possible for the Program Director or a designated staff member to gather a basic history about the prospective client. Information about the person's previous work history, other post high school training and preparation program enrollments, legal involvements, interests and dislikes, attitude, hobbies, physical disabilities, unusual behaviors and personality characteristics, responsiveness to questions, mode of dress, grooming, etc., were gathered during this visit. The Pre-Admission Interview form was completed during and immediately following the initial interview. When more than one interview was conducted, notes were added from each additional pre-admission interview that followed.

At the end of the prospective client's initial visit to the R&D Training Institute, the Program Director gave the client a copy of his card that contains his telephone number and an invitation to think about the program and his or her interest in enrolling in it. The prospective client was then asked to call the Program Director back to let him know if he or she would like to be considered for enrollment to Project MEAL. The prospective client was asked to assume responsibility for making this call rather than having a parent or someone else



R and D Training Institutes  
Life Development Institute

LOG OF PROSPECTIVE CLIENTS

*****									
Name	Date	Phone	Referral Source	Needs Housing	Core Trng	9 Mo	Proj MEAL	Follow Up Date	Remarks
1.									
2.									
3.									
4.									
5.									
6.									
7.									
8.									
9.									
10.									
11.									
12.									
13.									
14.									
15.									
16.									18
17.									
18.									

14

Program Director

R and D Training Institutes  
Life Development Institute

## Pre-Admission Interview

\*\*\*\*\*  
\*  
\* NAME \_\_\_\_\_ PHONE # \_\_\_\_\_ DATE \_\_\_\_\_ \*  
\*  
\* INQUIRY RE: \_\_\_\_\_ Housing \_\_\_\_\_ Core Trng \_\_\_\_\_ 9 Mo Prg \_\_\_\_\_ Proj MEAL \*  
\*  
\* Other \_\_\_\_\_ \*  
\*  
\* REFERRAL SOURCE: \_\_\_\_\_ DVR \_\_\_\_\_ DDD \_\_\_\_\_ Parent \_\_\_\_\_ Self \*  
\*  
\* \_\_\_\_\_ Child Protective Services \_\_\_\_\_ Adult Probation Services \*  
\*  
\* COUNSELOR \_\_\_\_\_ OFFICE \_\_\_\_\_ PHONE \_\_\_\_\_ \*  
\*  
\* FOLLOW UP NEEDED ( Y N ): What Is Needed? \_\_\_\_\_ \*  
\*  
\* Person Responsible \_\_\_\_\_ Do By \_\_\_\_\_ \*  
\*\*\*\*\*

REMARKS:

\*\*\*\*\*  
INTERVIEW # 1 \_\_\_\_\_ Date \_\_\_\_\_

\*\*\*\*\*  
INTERVIEW # 2 \_\_\_\_\_ Date \_\_\_\_\_

\*\*\*\*\*  
\* ACTION TAKEN: \*  
\* 1. Date Admitted to: \_\_\_\_\_ Core Trng \_\_\_\_\_ 9 Mo Prg \_\_\_\_\_ Proj MEAL \*  
\*  
\* 2. Housing Arranged ( Yes No ) Beginning On: \_\_\_\_\_ \*  
\*  
\* 3. Referred To: \_\_\_\_\_ Date \_\_\_\_\_ \*  
\*\*\*\*\*

do it. This act was viewed as an important first step in becoming independent from one's parents. It also served as a test of the person's willingness to contribute to development of those skills needed to become successfully employed.

The Program Director made follow-up calls to those prospective clients who did not call back within 48 hours of their visit to the R&D Training Institutes. The client's failure to call back did not automatically eliminate him or her from admission to the program.

The pre-admission interview was followed by the collection and review of documentation of which described the prospective client's handicap and justifies their enrollment in Project MEAL. Ideally, the project assessment team met and reviewed this documentation prior to admission. Such a procedure worked well when the prospective client was being referred by his or her parents who brought this documentation along to the pre-admission interview.

Each prospective client who was admitted to Project MEAL was sent a copy of the admission letter which appears on the following page. This letter, which informed clients about the date of their admission to the core training program, was accompanied by (1) a list of items such as bed linens and a toothbrush that the client needed to have at the time of enrollment in the core training program, and (2) a contract that listed the fee schedule for training and housing costs. The contract was forwarded to the sponsoring agencies such as vocational rehabilitation when they were paying for the client's training program.

Clients who did not qualify for enrollment for Project MEAL were considered for enrollment in another R&D program. Those who did not qualify for one of these programs were assisted in finding appropriate services from another agency. The Referral for Training or Services form was used by the Program Director to document referral of clients to another agency for medical, evaluation, skill training, etc. This could occur at any time during the client's enrollment in Project MEAL.



**LIFE DEVELOPMENT INSTITUTE**

A Division of Research and Development  
Training Institutes, Inc.

Dear James:

Congratulations! You have taken a strong first step in the on-going journey to a successful life.

You have been accepted into the Life Development Institute of the R&D Training Institutes, Inc. The session you will be in starts November 9, 1987. In the meantime, we bid you welcome in advance of your arrival.

Please be advised that check-in time will be from noon to 3:00 P.M., Sunday, November 8. Report to 1720 East Monte Vista, Apartment #120. Following check-in, report to the Clubhouse (#110) by 4:00 P.M. We will review all the Program and Residential Standards, Policies, Rules and Regulations - this is a mandatory meeting between the Chief Administrator and you. Parents are welcome and encouraged to attend. Do let us know if you cannot meet this timeline. Classes start promptly at 9:00 A.M., Monday, November 9, 1987, in Apartment #110.

Enclosed is pertinent information regarding items that you need to bring and suggested optional items you might elect to bring. Please complete the enclosed "Emergency & Insurance Information" form and bring with you. The enclosed "Service Authorization and Contract" needs to be reviewed and signed. Do advise if there are any questions or revisions.

The most important thing is that we develop a rapport with you that will enable you to take the tools and techniques that we offer and use them. In other words, we want you to have an opportunity to exercise your inherent right - that of being a successful independent adult!

Sincerely,

Robert Crawford  
Program Director

RC:d  
Encl.

P.O. Box 15112  
Phoenix, AZ 85060  
602) 254-0822

R and D Training Institutes  
Life Development Institute

REFERRAL FOR TRAINING OR SERVICES

\*\*\*\*\*  
\*  
\* NAME \_\_\_\_\_ GROUP \_\_\_\_\_ DATE \_\_\_\_\_  
\*\*\*\*\*

REFERRAL FOR

\*\*\*\*\*  
\* \_\_\_\_\_ Medical \_\_\_\_\_ Vocational Evaluation \_\_\_\_\_ Skill Training \_\_\_\_\_  
\* \_\_\_\_\_ Counseling \_\_\_\_\_ Psychoeducational Eval \_\_\_\_\_ Speech Therapy \_\_\_\_\_  
\* \_\_\_\_\_ Hearing Eval \_\_\_\_\_ Vision Eval \_\_\_\_\_ Psychiatric Eval & Therapy \_\_\_\_\_  
\* \_\_\_\_\_ (Other) \_\_\_\_\_  
\* \_\_\_\_\_ (Other) \_\_\_\_\_  
\*\*\*\*\*

REFERRAL TO

\*\*\*\*\*  
\*  
\* 1. NAME OF PERSON OR AGENCY \_\_\_\_\_ PHONE \_\_\_\_\_  
\* ADDRESS \_\_\_\_\_  
\* SERVICES TO START \_\_\_\_\_ SERVICES TO END \_\_\_\_\_  
\* ESTIMATED COST \_\_\_\_\_ TO BE PAID BY \_\_\_\_\_  
\* 2. NAME OF PERSON OR AGENCY \_\_\_\_\_ PHONE \_\_\_\_\_  
\* ADDRESS \_\_\_\_\_  
\* SERVICES TO START \_\_\_\_\_ SERVICES TO END \_\_\_\_\_  
\* ESTIMATED COST \_\_\_\_\_ TO BE PAID BY \_\_\_\_\_  
\* 3. NAME OF PERSON OR AGENCY \_\_\_\_\_ PHONE \_\_\_\_\_  
\* ADDRESS \_\_\_\_\_  
\* SERVICES TO START \_\_\_\_\_ SERVICES TO END \_\_\_\_\_  
\* ESTIMATED COST \_\_\_\_\_ TO BE PAID BY \_\_\_\_\_  
\*\*\*\*\*

PERSON/S RESPONSIBLE FOR MONITORING DELIVERY OF THE ABOVE SERVICES

\*\*\*\*\*  
\* 1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_  
\*\*\*\*\*

Referral Authorized By \_\_\_\_\_ Date \_\_\_\_\_

## Chapter 4

### Assessment

Various types of assessment data were used to gain an understanding of each Project MEAL client. Reports of psychoeducational, psychiatric, medical and vocational evaluations provide information that was needed to determine the eligibility of prospective clients for enrollment in the project. Reports from these evaluations also contain information that were of great value to program staff members during development of the client's IETEP's.

Clients referred to Project MEAL by state vocational rehabilitation agencies usually had recent psychoeducational evaluations and medical examinations. Ideally, copies of reports from these evaluations accompanied the referral forms when they were received from vocational rehabilitation. When this happened, it was possible for the project assessment team to review these records prior to the prospective clients' admission to the project. Referrals from other agencies or the prospective client's parents should also be accompanied by supporting documentation. Those who hadn't had a recent physical examination were asked to see their family physician and to have a copy of the report forwarded to the R&D Training Institutes. Those who have not had recent psychoeducational evaluations were assisted in locating a qualified examiner who could perform the needed assessment and forward a report to the R&D Training Institutes.

#### The Assessment Team

Members of the project assessment team included the Program Director, Senior Case Manager, and Assessment Specialist. Their responsibilities included reviewing each of the reports from previous assessments and identification of areas in which additional assessment was needed. A key responsibility of the assessment team was translation of professional jargon found in these reports into language that could be readily understood by the other project staff members. The Senior Case Manager prepared a one to two page summary of all of the assessments for use during IETEP conferences. These summaries were also of value at other times during the project where staff members had a need for a quick overview of the information about a client.

#### The Psychoeducational Evaluation

Each client's psychoeducational evaluation should include a comprehensive assessment using the following instruments:

Wechsler Adult Intelligence Scale - Revised (WAIS-R)  
Peabody Individual Achievement Test, or  
The Wide Range Achievement Test

Use of the WAIS-R Computer Report (Nicholson, 1982) in the analyses of some of the project clients' test scores proved to be a valuable source of additional diagnostic information. This computer-based procedure produces an eight page diagnostic report that contains information in addition to the usual psychological report.

Additional assessments, including ones related to the prospective client's emotional health should be scheduled where clinical observations made during the psychoeducational evaluation suggest these evaluations are needed. It is highly desirable for the person who is evaluating the person's emotional health to have a full understanding of the emotional development and behavioral characteristics of learning disabled adults.

### Medical Evaluation

Prospective clients should have comprehensive physical examinations prior to their enrollment. Medical reports were of particular importance in those cases where medical factors suggested that certain jobs should be avoided by the client. For example, allergies that made it inadvisable for clients to work in certain environments and back problems that called for positions that did not require lifting.

Project staff members need to know when clients are seizure prone, when they have blood sugar problems and whenever other health problems exist. Knowledge of this information helps prepare staff members for health-related emergencies that may occur during their enrollment in R&D Training Institutes programs.

### Learning Style Evaluation

Each Project MEAL participant completed the Learning Style Inventory (Brown and Cooper, 1983). The Learning Style Inventory is a 45 item instrument for use in determining a person's learning style. The three categories assessed with the LSI are cognitive, social and expressive preferences. These three categories are subdivided into nine areas:

1. Cognitive Style: The preferred mode of taking in information.
  - (a) Auditory Language: Person learns from hearing words--is capable of understanding and remembering words or facts learned by hearing.
  - (b) Visual Language: Person learns from seeing words in books, on the board, and on charts. Remembers and uses information better after reading it.

- (c) Auditory Numerical: Person learns by hearing numbers and oral explanations--remembers phone numbers locker numbers, works problems mentally.
  - (d) Visual Numerical: Person needs to see numbers in a book or on paper in order to work them--more likely to understand and remember math facts when they can be seen.
  - (c) Tactile Concrete: Person learns best by experience--needs a combination of stimuli--prefers to handle, touch, and work with what is being learned.
2. Social Style: Preference of learner for working in a group or alone.
- (a) Individual Learner: Gets more work done, thinks best and remembers more when working and learning alone.
  - (b) Group Learner: Strives to study with at least one other person and will not get as much done alone. Group interaction increases this person's learning and later recognition of facts.
3. Expressive Style: Preferred method of giving out information:
- (a) Oral Expressive: Can easily tell you what s/he knows; talks fluently, comfortably; organizing and putting thoughts on paper may be too slow and tedious.
  - (b) Written Expressive: Can write fluent essays and answers on tests that show what s/he knows; thought are better organized on paper than when stated orally.

The LSI can be administered in paper/pencil form and then entered into a computer for analysis, or can be completed by reading the items on the computer screen. In each case a printout is generated which shows the strength of the subject's preference or dislike of having material presented or being required to express oneself in the modes and social situations described in each of the nine areas listed above. A learning style profile for a learning disabled adult who has severe reading and handwriting disabilities appears on the following page. This printout contains the profile, a description of each style and prescriptive information regarding the client.



# LEARNING STYLES C' RT FOR John Sample

LEARNING STYLE	LEAST LIKE	MOST LIKE
VISUAL LANGUAGE	= ***	
VISUAL NUMERIC	=	
AUDITORY LANGUAGE	= *****	
AUDITORY NUMERIC	= *****	
TACTILE CONCRETE	= *****	
SOCIAL INDIVIDUAL	= ***~*****	
SOCIAL GROUP	= *****	
ORAL EXPRESSIVENESS	= *****	
WRITTEN EXPRESSIVENESS	=	
	1 15 30 45	

VISUAL LANGUAGE means that you learn language skills by sight, mainly by reading.

VISUAL NUMERIC means that you do better with numbers when you see them written.

AUDITORY LANGUAGE means that you learn best by listening.

AUDITORY NUMERIC means you are better with numbers when you can hear them spoken.

TACTILE CONCRETE means you are a builder and learn best when you can touch what you are studying.

SOCIAL INDIVIDUAL means you prefer to work on your own.

SOCIAL GROUP means you learn best by interacting with a group.

ORAL EXPRESSIVENESS means how well you express yourself when you talk.

WRITTEN EXPRESSIVENESS means how well you express yourself in writing.

## PRESCRIPTIVE INFORMATION FOR John Sample

1. Use tapes, lecture, rote oral practice, or discussions to help student(s) hear information to be learned.
2. Read and discuss problems aloud as they are being worked. Student(s) will also benefit from discussions of problems and concepts.
3. Student(s) will need to interact with others to review for tests.
4. Allow student(s) to present reports to class or on tape for credit. Demand a minimum (but high quality) of written work. Evaluate more on oral work than on written tests.

### Career Ability Placement Survey

Each Project MEAL client completes six areas of the Career Ability Placement Survey (CAPS) during the first week of their enrollment in the Core Training Program. These subtests include the following:

1. Mechanical Reasoning: Measures how well the client understands basic mechanical principles and laws of physics.
2. Spatial Relations: Measures how well the client can visualize or think in three dimensions and mentally picture the positions of objects from a drawing or picture.
3. Verbal Reasoning: Measures how well the client can reason with words and their facility for understanding and using concepts expressed in words.
4. Numerical Ability: Measures how well the client can reason with and use numbers and work with quantitative materials and ideas.
5. Language Usage: Measures how well the client can recognize and use standard English grammar, punctuation and capitalization.
6. Word Knowledge: Measures how well the client can understand the meaning and precise use of words.

### Vocational Evaluation

Each Project MEAL client received a comprehensive vocational evaluation at the Vocational Evaluation Unit at the Maricopa Skills Center. A description of the instruments used and skills assessed during this evaluation follow. An example of a vocational evaluation report follows the description of vocational evaluation instruments and skills included in this portion of the assessment battery.

### Other Evaluations

Clients who exhibit signs of difficulties in other areas such as speech and hearing are referred for evaluations as needed.

MARICOPA SKILL CENTER  
VOCATIONAL EVALUATION CENTER  
4118 East Wood  
Phoenix, Arizona 85040  
Phone: 437-1550, ex.33

The Vocational Evaluation Center provides assessment services geared to the student's individual needs. The evaluation center maintains a low caseload in order to get to know people as individuals. Most evaluations are completed in two consecutive days.

The Vocational Evaluation Center's expertise is matching people up with jobs and/or post-secondary vocational programs available in the Valley area (e.g., Maricopa Skill Center, local community colleges, proprietary schools, etc.). Our emphasis is on work and training for work. We concentrate on identifying the strengths, skills, and talents an individual possesses and building on those. We also identify potential problem areas and counsel clients on how to either overcome problems or avoid them by making a better job choice.

We discuss both short and long range goals with students. We would like to help all of our clients find jobs they can do well and enjoy. We provide the student with the information necessary to begin the job and career decision-making process. We work with students in any year of school.

Our philosophy is based on common sense principles. We want to see how a person can do when they work at their best. We want our students to understand what the scores on tests mean in terms of work and training for work. We want the evaluation process to enhance a person's self image and help them begin to see themselves in a more positive light, based on honest information. We want to provide our clients with the tools necessary to make good choices. We want to make several recommendations whenever possible to allow a person to choose something they want to do. We want all of our clients to have fun working with us.

We provide a free lunch at the Skill Center cafeteria and have bus service available to the Northwest Valley area for those students who desire it. We are willing to staff with parents individually immediately after completing evaluation or at a time parents can arrange with us. If you have any questions or would like to arrange an individual tour of the Evaluation Center, feel free to contact us.

REFERENCE MANUAL  
FOR  
VOCATIONAL EVALUATION INSTRUMENTS

This pamphlet is intended to be used as a reference when interpreting evaluation reports from the Maricopa Skill Center. The description of the instruments is not to be regarded as complete. For more detailed orientation to a particular instrument, please contact Bill Gadzia at the Maricopa Skill Center.

INTEREST INVENTORIES

1. Career Occupational Preference System - COPS

This guide is designed to summarize and assist respondent in planning a career. The first step is to define the kinds of work that the client is interested in and then to compare the relative strengths of the clients interests in activities performed in a great many different occupations.

Approximate testing time: 1.5 hour

2. Career Assessment Inventory Profile - CAIP

Comprised of vocational interest inventories which require the respondent to indicate like or dislike for a wide range of occupations, occupational activities, and school subjects. The respondent's answers are usually computer analyzed for general overall trends, for consistency in response to 22 basic interest areas, and for the degree of similarity between the tested person's responses, and characteristic responses of men and women employed in a wide range of occupations. The results are summed up in a profile. Additionally, measures of academic orientation and introversion or extroversion are provided.

Approximate testing time: 1.0 hour

3. Wide Range Interest-Opinion Test - WRIOT

The WRIOT was designed to cover as many areas and levels of human activity as possible. The activities are portrayed in pictures; reading is not a factor. They include a wide gamut of work from unskilled labor through technical occupations to professional and managerial positions.

Approximate testing time: 1.5 hour

4. Guidance Information System - GIS

GIS is a computerized source of occupational and educational information. A computer printout can be provided to clients of up to 1,025 jobs.

### WORK PERSONALITY ASSESSMENT

1. 16 FF (Personality Factors) Test Profile

Designed to give the most complete coverage of personality traits possible in a brief time. The personality factors which are vocationally significant for each client are delineated.

Approximate testing time: 1 hour

### ACADEMIC TESTS

1. Science Research Associates - SRA Reading Index

A 60-item, multiple choice test that progresses through five levels of development: picture-word association, word decoding, comprehension of sentences, and comprehension of paragraphs. The items are oriented to adults. They employ everyday language with the vocabulary increasing from level to level.

Approximate testing time: 45 minutes

2. SRA Arithmetic Index

A 54-item, multiple choice answer test that progresses through four developmental skill levels: addition and subtraction of whole numbers, multiplication and division of whole numbers, basic operations involving fractions, and basic operations involving decimals and percents.

Approximate testing time: 45 minutes

3. Gates-MacGinitie Reading Test (Forms D, E, and F)

Provides grade level measures of reading ability in:

- a. Vocabulary
- b. Comprehension

Approximate testing time: 1 hour

4. The Adult Basic Learning Exam - ABLE

Yields grade-level scores in the areas of reading comprehension, vocabulary, spelling, and arithmetic.

Approximate testing time: 2 1/2 hours

ACADEMIC TESTS (Contd)

5. Wide Range Achievement Test of Reading - WRAT

Provides grade-level scores in reading.

Approximate testing time: 30 minutes

6. Wide Range Achievement Test of Arithmetic - WRAT

Provides a grade-level score in arithmetical ability.

Approximate testing time: 30 minutes

7. Wide Range Achievement Test of Spelling - WRAT

Provides a grade-level score for spelling.

Approximate testing time: 30 minutes

SENSORY SCREENING

1. Titmus Vision Test

Tests near and distant visual acuity, stereoscopic depth perception, color perception, and vertical and lateral muscular balance. Results compared against standards for various trades.

Approximate testing time: 30 minutes

2. Beltone Hearing Test

Screening test to identify those who may have hearing problems.

Approximate testing time: 30 minutes

SPECIFIC APTITUDES

1. Cashier Sales Test - CST

Designed to measure a person's ability to perform mathematical computations of the kind commonly encountered in cashiering trades. It includes unit-pricing problems, numerical comparison, addition, and subtraction problems (change-making). Results expressed as percentage.

Approximate testing time: 20 minutes

2. Bennett Mechanical Comprehension Test

Measures a person's ability to understand the principles involved in the operation and repair of complex machinery.

Approximate testing time: 40 minutes

. SPECIFIC APTITUDES (Contd)

3. Standard Progressive Matrices - Raven

Designed to measure logical reasoning potential and learning aptitude. The instrument is completely nonverbal. The user is required to follow a pattern progression to its logical conclusion.

Approximate testing time: 1.5 hour

4. Revised Minnesota Paper Form Board Test

Assesses a person's perceptual ability to learn to work with material illustrated by diagrams. It is correlated with success in mechanical occupations.

Approximate testing time: 45 minutes

5. Career Ability Placement Survey Spatial Relations - CAPS-SR

Assesses a person's aptitude for being able to visualize the three dementionalize aspects of forms and space.

Approximate testing time: 30 minutes

DEXTERITY TESTS

1. Purdue Pegboard Test

A test of fingertip dexterity, designed to aid in the selection of employees for industrial jobs, such as assembly, packing, operation of certain machines, and other manual jobs.

Five separate scores can be obtained with the Purdue Pegboard:

- a. Right Hand
- b. Left Hand
- c. Both Hands
- d. Right + Left + Both Hands
- e. Assembly

Approximate testing time: 30 minutes

2. Crawford Small Parts Dexterity Test

Designed to measure fine eye-hand coordination. Performance on the Crawford is expected to be related to success in such jobs as wiring intricate devices, radio tube manufacture, engraving and etching, and the assembly and adjustment of meters, clocks, watches, office machines, and other instruments.

Approximate testing time: 30 minutes

DEXTERITY TESTS (Contd)

3. Minnesota Rate of Manipulation Test

Provides a measure of hand-rate manipulation (placing), and finger-rate manipulation (turning). It can be used as an aid in selecting workers for jobs which require accuracy and speed of arm and hand movement.

Approximate testing time: 20 minutes

4. Bennett Hand-Tool Dexterity Test

Constructed to provide a measure of proficiency in using ordinary mechanic's tools. This type of skill is important in many different factory jobs, in industrial apprentice training, and the servicing of home, office, farm, and automobile equipment.

Approximate testing time: 20 minutes

WORK SAMPLES

1. Valpar Component Work Sample #1 - Small Tools (Mechanical)

VCWS #1 measures a person's understanding of, and ability to, work with small tools. The design of the sample forces the client to work in difficult physical positions, using his fingers and hands in a very small space - the actual work often blocked from the client's vision.

Approximate testing time 2 1/2 hours

2. Valpar Component Work Sample #2 - Size Discrimination

VCWS #2 measures a person's ability to perform work tasks requiring visual size discrimination.

Approximate testing time: 15 minutes

3. Valpar Component Work Sample #3 - Numerical Sorting

VCWS #3 measures a person's ability to perform tasks requiring the use of numbers and numerical series.

Approximate testing time: 20 minutes



WORK SAMPLES (Contd)

4. Valpar Component Work Sample #4 - Upper Extremity Range of Motion

VCWS #4 measures a person's upper extremity range of motion, including the shoulder, upper arm, forearm, elbow, wrist, and hand. The work sample is designed to give the evaluator an actuarial level of the client's performance, and to provide the evaluator with insight into such related factors as neck and back fatigue, finger dexterity and finger tactile sense. These individual motions and related factors should not be measured independently. They need to be measured and evaluated as they relate to the entire upper extremity range of motion of the individual in a work stress situation.

Approximate testing time: 1 hour

5. Valpar Component Work Sample #5 - Clerical Comprehension and Aptitude

VCWS #5 measures a person's ability to perform entry-level clerical tasks. The work sample was designed to be administered to individuals with little or no clerical experience. Incorporated within this work sample is a typing aptitude, bookkeeping, alphabetical filing, mail sorting, and telephone answering test.

Approximate testing time: 3 1/2 hours

6. Valpar Component Work Sample #5B - Bookkeeping

VCWS #5B measures a person's ability to learn and perform entry-level bookkeeping tasks.

Approximate testing time: 1 1/2 hour

7. Valpar Component Work Sample #6 - Independent Problem Solving

VCWS #6 measures a person's ability to perform work tasks requiring the visual comparison and proper selection of a series of abstract designs. The purpose of the sample is to give a measure of a person's basic independent problem-solving ability.

Approximate testing time: 1/2 hour

8. Valpar Component Work Sample #7 - Multi-Level Sorting

Measures a person's ability to make decisions while performing work tasks requiring physical manipulation and visual discrimination of colors, color-numbers, color-letters, and a combination of color-letter-numbers. The work sample permits the evaluator to establish a distinct level of individual decision-making ability.

Approximate testing time: 1/2 hour

WORK SAMPLES (Contd)

9. Valpar Component Work Sample #8 - Simulated Assembly

Measures a person's ability to work at an assembly task requiring repetitive physical manipulation and evaluates a person's bilateral use of the upper extremities. The work sample is characteristic of conveyor-assembly jobs in which material moves toward and away from workers on the assembly line.

Approximate testing time: 1/2 hour

10. Valpar Component Work Sample #9 - Whole Body Range of Motion

VCWS #9 measures the agility of a person's gross body movements of the trunk, arms, hands, legs, and fingers as they relate to the functional ability to perform job tasks.

Approximate testing time: 1 hour

11. Valpar Component Work Sample #10 - Tri-Level Measurement

VCWS #10 measures a person's ability to perform very simple to very precise inspection and measurement tasks. The work sample is designed so that the client is forced to make decisions which increase in level of difficulty, in order to determine if specially lathed, machined parts fit specific tolerances.

Approximate testing time: 1 1/2 hours

12. Valpar Component Work Sample #11 - Eye-Hand-Foot Coordination

VCWS #11 measures a person's ability to use his/her eyes, hands, and feet simultaneously and in a coordinated manner.

Approximate testing time: 1/2 hour

13. Valpar Component Work Sample #12 - Electronic Soldering & Inspection

VCWS #12 measures a person's ability to acquire and apply the basic skills necessary to perform soldering and inspection tasks at varying levels of difficulty. The work sample was designed to apply itself to entry-level worker requirements in various industries.

Approximate testing time: 2 hours

14. Singer Vocational Evaluation Systems #15 - Medical Service

Designed to measure finger and manual dexterity, and ability to follow verbal instructions; basic reading and writing ability; simple arithmetic; reading a scale (thermometer), and elapsed time (sweep second hand on a watch); and, ability to follow instructions.

Approximate testing time: 3 hours

WORK SAMPLES (Contd)

15. Situational Assessment

Situational assessment is utilized to allow a client first-hand experience in any of the training programs available at Maricopa Skill Center. Situational assessment can be arranged for part of a day or more than one day.

16. Any further work samples which are utilized will be described in the final report of the evaluation.

MARICOPA COMMUNITY COLLEGE DISTRICT  
MARICOPA SKILL CENTER  
PHOENIX, ARIZONA

TO: Isabelle Romero, Project Director - Project Work Transition  
FROM: Bill Gadzia  
DATE: November 5, 1986  
SUBJECT: Jane Doe, Age 29  
Period of Evaluation: November 1 & 2, 1986

VOCATIONAL EVALUATION REPORT

REASON FOR REFERRAL

As an aid in career planning, Jane was referred to the Evaluation Center for an assessment of her vocational interests, skills, and aptitudes.

BACKGROUND INFORMATION

Marital Status:	Divorced
Dependents:	Self and three children, age 6, 4, and 1
Transportation:	Valid driver's license, has own car
Highest Grade Completed:	10th grade
Physical Restrictions:	None listed
Medication:	None listed
Hobbies:	Watch movies, listen to music
Employment History:	Fast food work
Present Skills:	None listed
Stated Interests:	"Not sure"

INTERESTS

In order to get a quick idea of Jane's vocational interests, the Wide Range Interest Opinion Test (WRIOT) was administered, a copy of which is enclosed for your use. On the WRIOT, Jane's highest interests were in drama, sales, and social service, but she also had interests in machine operation, and physical science.

On the attitudinal scales, her high sedentariness score suggests that she would be comfortable in a work situation where she had to sit or stay in the same place throughout much of the workday; her low score in risk indicates a disliking for risky or dangerous job activities; her ambition score suggests she did not view the pictured activities as opportunities

to improve her status or income; and her high negative bias score indicates that she knows the things she does not want to do.

In order to provide an additional measure of Jane's vocational interests, the Career Occupational Preference System (COPS) was administered. Selected pages of the COPS have been enclosed for your use and the original test booklet was given to Jane. On the COPS, Jane's highest interests were in clerical, skilled business, consumer economics, and skilled service.

Of the occupations listed on the COPS, Jane indicated most interest in cashier, credit clerk, telephone operator, general office clerk, customer service specialist, dress maker, embroidery machine operator, airplane flight attendant, and teacher aide.

#### TEST PERFORMANCES

1. Standard Progressive Matrices Test - RAVEN  
Measures logical reasoning potential.

Performance: 45th percentile

2. Gates MacGinitie Reading Test  
Provides grade level scores in vocabulary and reading comprehension.

Level D: Vocabulary 8.3 grade level  
Comprehension 7.6 grade level

3. Wide Range Achievement Arithmetic Test - WRATM  
Provides a grade level score in arithmetic.

Level I: 5.3 grade level

4. Revised Minnesota Paper Form Board Test  
Assesses a person's ability to recognize readily the spatial relationships involved in determining a whole when given its parts.

Timed Performance: 40th percentile

5. Crawford Small Parts Dexterity Test  
Measures fine-finger dexterity and hand-eye coordination, using small parts and small tools.

Pin & Collar: 60th percentile  
Screw Test: 40th percentile

6. Minnesota Rate of Manipulation Test  
Measures hand-rate manipulation (placing), and finger-rate manipulation (turning).  
  
Placing: 75th percentile  
Turning: 75th percentile
7. Valpar Component Work Sample #8 - Simulated Assembly  
Measures ability to work at an assembly task requiring repetitive physical manipulation and bilateral use of the upper extremities.  
  
Performance: 45th percentile
8. Valpar Component Work Sample #6 - Independent Problem Solving  
Measures ability to perform work tasks requiring the visual comparison and proper selection of a series of abstract designs.  
  
Time: 15th percentile  
Accuracy: 40th percentile  
Performance: 7th percentile  
Trial: 2  
Time: 40th percentile  
Accuracy: 75th percentile  
Performance: 48th percentile
9. Titmus Vision Test  
Tests near and distant visual acuity, stereoscopic depth perception, color perception, and vertical and lateral muscular balance. Results are compared against standards for various trades. Jane's vision does not meet guidelines for many different occupations.
10. Valpar Component Work Sample #7 - Multi-Level Sorting  
Measures a person's ability to perform work tasks requiring visual discrimination of colors, color-numbers, color-letters, and a combination of color-letter-numbers.  
  
Time: 25th percentile  
Accuracy: 90th percentile  
Performance: 57th percentile

#### ANALYSIS OF TEST PERFORMANCES

Jane's performance on the Standard Progressive Matrices Test (RAVEN), suggests that she should learn new material without great difficulty. Her score also suggests that she should be able to reason her way logically through problems encountered in training or on the job.

Jane's reading skills, as measured by the Gates MacGinitie Reading Test (GATES), are adequate to learn by working fairly extensively with written materials, as long as the terminology is not of a constantly changing nature. For training in areas such as nursing assistant, hospitality, automotive tune-up and repair, motorcycle repair, or cable TV technician,



it is recommended that she remediate her reading skills, at least concurrent with training, to increase her chances of both completing training and progressing upwards from an entry-level job placement.

Jane's math skills, as measured by the Wide Range Achievement Test (WRAT), indicate that she is presently uncomfortable when working with fractions. She will have to learn the fractions in training necessary for successful job development in cashier sales, automotive tune-up and repair, welding, food service and preparation, nursing assistant, bookkeeping, or hospitality, at least during training. However, this should not be an insurmountable difficulty.

Jane's performance on the Revised Minnesota Paper Form Board Test suggests that she will likely encounter some difficulties in working with wiring diagrams, blueprints, engine diagrams, anatomy charts, or other diagrammatically illustrated material which would be encountered in several different areas of training or work. With practice involving the materials utilized in a particular training program, she will likely be able to improve her abilities at working with such material to an acceptable level of functioning for job development. However, for work in an area where the material will vary greatly from day to day, such as the blueprints used in machine shops or in welding, difficulties in working with material of this type may cause some restriction in rising upwards from an entry-level job placement.

Jane's better than average performance on the pin and collar section of the Crawford Small Parts Dexterity Test indicates that she has the aptitude to work comfortably with tasks which require fine-finger or fingertip dexterity skills. Her lower performance on the other section of the Crawford suggests that she will require practice at some tasks before learning to work as quickly as she is capable, when utilizing parts or tools with which she is not already familiar.

Jane's performances on both sections of the Minnesota Rate of Manipulation Test suggest that she has the aptitude to perform dexterity related tasks, which require that she utilize objects which can be grasped in her fingers, much better than most people.

Jane's performance on VCWS #8, Simulated Assembly, suggests about an average aptitude for performing routine repetitive tasks for fairly extended time periods. Additionally, her mental attitude upon completion of this twenty minute, standing work sample, was positive. She said that it would have been possible to continue the task for an hour, and she would be willing to perform such a task for up to four hours a day, on the job.

Jane's accuracy score on VCWS #6, Independent Problem Solving, suggests that she should not require more supervision than most trainees or workers when learning new, multi-step tasks. Jane's score also suggests that she has the aptitude to work about as well as most people, in learning new procedures through a combination of oral directions and "hands-on" practice. Jane's lower than average time score on VCWS #6 suggests that she will likely require practice at decision-making tasks, before learning to work as quickly as she is capable. This low time score may

indicate that an extra effort was made to double check the work to avoid mistakes.

Jane's improvement in accuracy on the readministration of VCWS #6 indicates that she has the ability to learn from her mistakes and constructive criticism, and to improve performances on decision-making tasks with practice, such as would be inherent in most vocational training programs. Jane's improvement in the speed in which she performed this task indicates that she would likely benefit from the practice available in a vocational training program to learn to perform decision making tasks quicker.

Jane's vision, as measured by the Titmus Vision Test, did not meet training or industry guidelines. It is highly recommended that she be given an optical examination prior to training or work to insure that she encounters no insurmountable difficulties.

Jane's performance on VCW's #7, Multi-Level Sorting, suggests an ability to perform basic decision-making tasks accurately. Her low time score suggests that she prefers to work somewhat slowly, probably to avoid errors.

#### PERSONALITY TRAITS, WORK HABITS & GENERAL OBSERVATIONS

In order to provide a comprehensive characterization of Jane's significant personality traits, the 16 PF (Personality Factors) was administered. An analysis of her responses to this paper and pencil activity reveals that she sees herself as tending to be humble, mild, accomodating, and somewhat docile; sensitive, tender-minded, and artistic; and conservative, cautious, and inclined to go along with tradition, but also sees herself as tending to be easily upset, affected by feelings, and somewhat low in frustration tolerance; timid, shy, and restrained; forthright, unpretentious, and unsophisticated; and tense, restless, fretful, and driven.

Jane appeared on time for both days of evaluation, and was appropriately dressed and groomed. She was able to form a comfortable working relationship with the evaluator and demonstrated adequate communication skills in both her speech and listening ability. She performed everything that was requested, concentrated well, seemed satisfied when she completed, and was always interested in her performance results.

Jane was able to follow a multi-step procedure immediately, and could sign priorities so that she worked in an orderly, patterned, systematic manner. On activities that required decision-making, she seemed to prefer to work deliberately, probably in an effort to avoid errors. Her work consistently met or exceeded the expectations of the evaluator.



### SUMMARY AND RECOMMENDATIONS

For training or work, Jane's vocational assets consist of:

1. About average logical reasoning ability,
2. adequate reading skills to learn by working fairly extensively with written materials,
3. an aptitude to work more comfortably than most people when using small parts and tools with which she is already familiar,
4. much better than average dexterity aptitudes when working with items which can be grasped with the fingers,
5. about average aptitude for performing routine repetitive tasks for fairly extended time periods,
6. a willingness to perform basic assembly tasks for very extended time periods,
7. an aptitude to work about as accurately as most people when learning new, fairly complicated, decision-making tasks,
8. an ability to learn from her mistakes and accept constructive criticism, in learning new, fairly complicated, decision-making tasks,
9. an ability to improve the speed with which she performs independent, decision-making tasks with practice,
10. an ability to perform basic decision-making tasks in an accurate manner, and
11. a tendency to see herself as being humble, mild, accomodating, and somewhat docile; sensitive, tender-minded, and artistic; and conservative, cautious, and inclined to go along with tradition.

For training or work, Jane possesses the following vocational limitations:

1. Math skills which do not include a present ability to work with fractions,
2. a probable requirement of practice at working with material illustrated by diagrams in order to learn to work both quickly and accurately,
3. a probable requirement of practice before working comfortably with parts or tools with which she is not already familiar,

Doe  
Page 7

4. a tendency to perform decision-making tasks slowly, possibly to avoid errors,
5. vision which does not meet training standards, and
6. a tendency to see herself as being easily upset, affected by feelings, and somewhat low in frustration tolerance; timid, shy, and restrained; forthright, unpretentious, and unsophisticated; and tense, restless, fretful, and driven.

In light of the foregoing, Jane could be recommended for training in the following programs: cashier, food preparation, data entry operator, receptionist, or hotel desk clerk.

If immediate job development is deemed a more desirable vocational goal than training for Jane at the present time, she might be immediately job-developed as a sewing machine operator, teacher's aide (primary school), pre-school teacher's aide, or answering service operator.

Bill Gadzia  
Vocational Evaluation Coordinator

/jk

Enclosures: Copy of WRIOT, COPS

## Chapter 5

### The Project MEAL Curriculum And Instructional Program

Six areas of emphasis were included in the Project MEAL curriculum. These areas included the following:

- Area 1. Grooming and Attire
- Area 2. Personal and Social Development
- Area 3. Financial Planning and Transportation
- Area 4. Practical Law
- Area 5. Independent Living Skills
- Area 6. Job Training and Placement

The 41 competencies included in the Core Training Program are shown on the following pages. This form was used as part of the pre-assessment for newly enrolled project clients. It was used periodically during their enrollment in the program to assess the clients' progress in mastering these competencies as they moved through the project.

LIFE DEVELOPMENT INSTITUTE  
CORE TRAINING PROGRAM COMPETENCIES

		<u>Competencies</u>
I.	Health, Grooming and Attire	1.0 - 2.0
II.	Personal and Social Adjustment	5.0 - 13.0
III.	Financial/Transportation	14.0 - 23.0
IV.	Practical Law	24.0 - 25.0
V.	Home and Community Living	26.0 - 31.0
VI.	Job Development and Job Placement	32.0 - 41.0

Student Name\_\_\_\_\_

Student ID No. \_\_\_\_\_

Program Manager\_\_\_\_\_

**LIFE DEVELOPMENT INSTITUTE**  
**Core Training Program Competencies**  
**Competency Rating Scale**

Client Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ Sex \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_

Directions: Please rate the client according to his/her mastery of each item using the rating key below. Indicate the ratings in the column below the date for the rating period. Use the NR rating for items which cannot be rated. For subcompetencies rated 0 or 1 at the time of the final rating, place a check (✓) in the appropriate space in the yes column to indicate his/her ability to perform the subcompetency with assistance from the community.

Rating Key: 0 - Not Competent      1 - Partially Competent      2 - Competent      NR - Not Rated

To what extent has the client mastered the following subcompetencies:

Subcompetencies		Rater(s)					
		Date(s)					
I.	HEALTH, GROOMING AND ATTIRE						Yes
1.0	<u>Caring for Personal Needs</u>						
1.1	Exhibit proper grooming and hygiene						—
1.2	Demonstrate knowledge of physical fitness, nutrition and weight control						—
1.3	Demonstrate knowledge of common illness prevention and treatment						—
2.0	<u>Buying and Preparing Food</u>						
2.1	Demonstrate appropriate eating skills						—
2.2	Plan balanced meals						—
2.3	Purchase food						—
2.4	Store food						—
2.5	Prepare meals						—
2.6	Clean food preparation area						—
3.0	<u>Caring for Clothing</u>						
3.1	Wash clothing						—
3.2	Iron and store clothing						—
3.3	Perform simple mending						—
3.4	Purchase clothing						—

Subcompetencies	Rater(s)				
	Date(s)				
<b>4.0 Time Management</b>					Yes
4.1 Know personal time needs	—	—	—	—	—
4.2 Schedule days, weeks, months	—	—	—	—	—
<b>II. PERSONAL AND SOCIAL ADJUSTMENT</b>					
<b>5.0 Achieving Self Awareness</b>					
5.1 Identify interests and abilities	—	—	—	—	—
5.2 Identify needs vs. wants	—	—	—	—	—
5.3 Understand physical/emotional self	—	—	—	—	—
<b>6.0 Acquiring Self Confidence</b>					
6.1 Express feelings of worth	—	—	—	—	—
6.2 Tell how others see him/her	—	—	—	—	—
6.3 Accept praise	—	—	—	—	—
6.4 Accept criticism	—	—	—	—	—
6.5 Develop confidence in self	—	—	—	—	—
<b>7.0 Be able to Communicate with Others</b>					
7.1 Show ability to express oneself	—	—	—	—	—
7.2 Determine appropriate expressions allowable by employers, and acceptable to self and others	—	—	—	—	—
<b>8.0 Communicating Adequately With Others</b>					
8.1 Recognize emergency situations and know appropriate action to take	—	—	—	—	—
8.2 Speak adequately for understanding	—	—	—	—	—
8.3 Understand the subtleties of communication	—	—	—	—	—
<b>9.0 Maintaining Good Interpersonal Relationships</b>					
9.1 Know how to listen and respond	—	—	—	—	—
9.2 Know how to make and maintain friendships	—	—	—	—	—
<b>10.0 Achieving Socially Responsible Behavior</b>					
10.1 Know character traits needed for acceptance	—	—	—	—	—
10.2 Know proper behavior in public	—	—	—	—	—
10.3 Develop respect for the rights and properties of others	—	—	—	—	—
10.4 Recognize authority and follow instructions	—	—	—	—	—

(Rev. 7/23/87)

Subcompetencies	Rater(s)					
	Date(s)					
<b>11.0 Achieving Problem Solving Skills</b>						Yes
11.1 Understand the need for goals		—	—	—	—	—
11.2 Develop alternatives		—	—	—	—	—
11.3 Anticipate consequences		—	—	—	—	—
<b>12.0 Achieving Independence</b>						
12.1 Understand the impact of behavior on others		—	—	—	—	—
12.1 Demonstrate self organization skills		—	—	—	—	—
12.3 Develop goal achieving behavior		—	—	—	—	—
<b>13.0 Cope With Stress and Pressure</b>						
13.1 Identify and evaluate stress causing aspects of life		—	—	—	—	—
13.2 Understand how stress affects self both positively and negatively		—	—	—	—	—
13.3 Investigate ways to reduce stress by assertion and relaxation techniques		—	—	—	—	—
<b>III. FINANCIAL/TRANSPORTATION</b>						
<b>14.0 Figure Costs and Make Change</b>						
14.1 Add and subtract sums of money		—	—	—	—	—
14.2 Make change using silver coin and paper money		—	—	—	—	—
14.3 Use a calculator		—	—	—	—	—
14.4 Calculate sales tax, finance charges and gratuities (if applicable)		—	—	—	—	—
<b>15.0 Know How to Open and Maintain Checking Accounts</b>						
15.1 Locate banks or other financial institutions convenient for frequent use		—	—	—	—	—
15.2 Obtain information from banks and other financial institutions as to type of personal checking account available, including information of benefits and service charges		—	—	—	—	—
15.3 Select institution with type of account that best meets personal needs		—	—	—	—	—
15.4 Know how to apply for checking account		—	—	—	—	—
15.5 Write out a check correctly		—	—	—	—	—

Subcompetencies	Rater(s)				
	Date(s)				
					Yes
15.6 Keep accurate record of financial transactions	—	—	—	—	—
15.7 Balance checkbook regularly	—	—	—	—	—
16.0 <u>Budget for Monthly Expenditure</u>					
16.1 Determine how to keep expenditures within a manageable margin	—	—	—	—	—
16.2 Demonstrate ability to write a working budget	—	—	—	—	—
16.3 Allow for unexpected expenses	—	—	—	—	—
16.4 Understand payroll deductions	—	—	—	—	—
17.0 <u>Identify types of Savings</u>					
17.1 Distinguish between short-range and long-range savings goals	—	—	—	—	—
17.2 Obtain information on amount of interest acquired by different savings	—	—	—	—	—
17.3 Shop around for type of savings that best meet one's needs, i.e., certificates of deposit, savings accounts at different types of institutions, etc.	—	—	—	—	—
17.4 Distinguish between savings and investments	—	—	—	—	—
18.0 <u>Determine Needs Necessary for Maintenance of Living</u>					
18.1 List out basic needs and items necessary to maintain style of living	—	—	—	—	—
18.2 Determine which needs are immediate, in terms of buying or repair, and which can be postponed	—	—	—	—	—
18.3 Analyze needs and wants for long-range planning of purchases	—	—	—	—	—
18.4 Know to take advantage of seasonal special sales and discount coupons	—	—	—	—	—
18.5 Know how to do comparison shopping	—	—	—	—	—
19.0 <u>Know the Relationship Between Cost and Quality</u>					
19.1 Know what elements (cost of material, labor, advertising, quality of work, etc.) go into making up the cost of an item	—	—	—	—	—
19.2 Understand the relationship between quality and durability.	—	—	—	—	—



Subcompetencies	Rater(s)				
	Date(s)				
					Yes
<b>20.0 <u>Keep Accurate Records for Tax Purposes</u></b>					
20.1 Know and understand the requirement for filing income tax returns	—	—	—	—	—
20.2 Keep receipts of medical and other deductible expenses	—	—	—	—	—
20.3 Know how to contact IRS for information on legal deductions	—	—	—	—	—
<b>21.0 <u>Calculate Cost of Using Private or Mass Transit System for Getting to and From Work</u></b>					
21.1 Calculate cost of using personal car for getting to work, including gasoline, repair, maintenance expenses, payments and insurance	—	—	—	—	—
21.2 Calculate cost of getting to work using local public transportation	—	—	—	—	—
21.3 Compare costs of getting to work by personal car, car pool, and local public transportation	—	—	—	—	—
<b>22.0 <u>Decide and Select Credit Accounts for Personal Use</u></b>					
22.1 Decide advantages and disadvantages of charging goods or services vs. paying cash	—	—	—	—	—
22.2 Know how to apply for charge account or credit card based on need and intended use	—	—	—	—	—
22.3 Know how to keep records of charge transactions	—	—	—	—	—
22.4 Know how to maintain good credit	—	—	—	—	—
22.5 Determine when cancelling charge or credit card is advantageous	—	—	—	—	—
<b>23.0 <u>Getting Around the Community (Mobility)</u></b>					
23.1 Demonstrate knowledge of traffic rules and safety practices	—	—	—	—	—
23.2 Demonstrate knowledge of directional orientation within the community	—	—	—	—	—
23.3 Use maps and bus schedules to plan trips within the community	—	—	—	—	—

Subcompetencies	Rater(s)					
	Date(s)					
<b>IV. PRACTICAL LAW</b>						Yes
<b>24.0 <u>Knowing About Law and the Legal System</u></b>						
24.1 Understand basics about law, kinds of laws, who makes laws		—	—	—	—	—
24.2 Knowledge of settling disputes outside of court		—	—	—	—	—
24.3 Understand constitutional rights and protection under the law		—	—	—	—	—
24.4 Understand registration and voting procedures		—	—	—	—	—
24.5 Understand Selective Service procedures		—	—	—	—	—
<b>25.0 <u>Knowing About Consumer Law</u></b>						
25.1 Knowledge of how laws protect the consumer		—	—	—	—	—
25.2 Understand contracts, warranties, unsafe or dangerous products		—	—	—	—	—
25.3 Understand deceptive sales practices		—	—	—	—	—
25.4 Understand default and collection practices		—	—	—	—	—
<b>V. HOME AND COMMUNITY LIVING</b>						
<b>26.0 <u>Selecting, Managing, and Maintaining a Home</u></b> Know how to:						
26.1 Select adequate housing		—	—	—	—	—
26.2 Maintain a home		—	—	—	—	—
26.3 Use basic appliances and tools		—	—	—	—	—
26.4 Maintain home exterior		—	—	—	—	—
26.5 Know principals of infestation (pest) control		—	—	—	—	—
<b>27.0 <u>Knowing About Housing</u></b>						
27.1 Choosing a place to live		—	—	—	—	—
27.2 Understand rights and duties of landlords and tenants		—	—	—	—	—
27.3 Understand potential landlord-tenant problems		—	—	—	—	—

Subcompetencias	Rater(s)					
	Data(s)					
<b>28.0 <u>Cara and Upkeep of the Home</u></b>						Yes
28.1 Kitchen is clean		—	—	—	—	—
28.2 Baths are clean		—	—	—	—	—
28.3 Living room is clean		—	—	—	—	—
28.4 Bedroom(s) are clean		—	—	—	—	—
28.5 Exterior patios are clean		—	—	—	—	—
28.6 Garbage/trash properly disposed		—	—	—	—	—
<b>29.0 <u>Safety in the Home</u></b>						
29.1 Knows how to respond to fire drill		—	—	—	—	—
29.2 Knows how to put out grass fire		—	—	—	—	—
29.3 Cleans up spills on floors		—	—	—	—	—
29.4 Knows simple first aid		—	—	—	—	—
29.5 Knows emergency procedures, such as knows 911 phone number; knows address and apartment number		—	—	—	—	—
<b>30.0 <u>Community/Social Participation</u></b>						
30.1 Participates in relevant LDI community meetings		—	—	—	—	—
30.2 Participates in LDI social/recreational activities		—	—	—	—	—
30.3 Maintains good relationships with room- mates and neighbors		—	—	—	—	—
30.4 Maintains cleanliness of common areas		—	—	—	—	—
<b>31.0 <u>Utilizing Recreation and Leisure</u></b>						
31.1 Participate actively in planned off-site group activities		—	—	—	—	—
31.2 Know activities and available community resources		—	—	—	—	—
31.3 Plan and choose activities wisely		—	—	—	—	—
<b>VI. JOB DEVELOPMENT AND JOB PLACEMENT</b>						
<b>32.0 <u>Demonstrates Positive Work Attitude</u></b>						
32.1 Accepts and utilizes constructive criticism and instruction		—	—	—	—	—
32.2 Maintains good attendance and punctuality		—	—	—	—	—

Subcompetencies	Rater(s)				
	Date(s)				
32.3 Continues working without supervision		—	—	—	—
32.4 Accepts personal responsibility and commitments and interactions		—	—	—	—
33.0 <u>Comprehends Duties and Responsibilities</u>					
33.1 Demonstrates effective, goal-oriented motivation		—	—	—	—
33.2 Knows and utilizes appropriate chain of command		—	—	—	—
33.3 Knows and obeys rules		—	—	—	—
34.0 <u>Follows Safety and Health Rules and Social Norms</u>					
34.1 Obeys safety rules and regulations		—	—	—	—
34.2 Practices acceptable personal hygiene for work environment		—	—	—	—
35.0 <u>Acts Independently</u>					
35.1 Completes work assignments on time		—	—	—	—
35.2 Demonstrates initiative		—	—	—	—
35.3 Demonstrates problem-solving ability		—	—	—	—
35.4 Asks for appropriate aid and information		—	—	—	—
36.0 <u>Matches Interests, Aptitudes and Abilities to Possible Career Goals</u>					
36.1 Utilizes measures of interests, aptitudes and abilities to identify appropriate career clusters		—	—	—	—
36.2 Lists possible career goals from appropriate career clusters		—	—	—	—
37.0 <u>Determines Specific Career Goal</u>					
37.1 Utilizes standard reference books and periodicals to determine prerequisites to possible career goals.		—	—	—	—
37.2 Considers experience, training and resources to identify needs and potential barriers		—	—	—	—
37.3 Utilizes periodicals to obtain lists of local employers relevant to goals		—	—	—	—
37.4 Contacts employers to further specify training required, occupational ladder, and entry-level requirements		—	—	—	—

Yes

Subcompetencies	Refer(s)					
	Date(s)					
37.5 Verifies the availability of resources for training, <u>if needed</u>		—	—	—	—	Yes
37.6 Visits training centers and selects one most appropriate for needs (if necessary)		—	—	—	—	—
38.0 <u>Analyzes Work History for Utilization in Job Applications, Resume, and Interviews</u>						
38.1 Describes work experiences in terms of knowledge, skills, and abilities		—	—	—	—	—
38.2 Utilizes skills, abilities and knowledge descriptions that are relevant to job target		—	—	—	—	—
39.0 <u>Completes Job Application and Processing Forms</u>						
39.1 Compiles an accurate and detailed data sheet for filling out employment forms		—	—	—	—	—
39.2 Utilizes effectively references, special interests/hobbies, affiliations/clubs, and open-ended questions on employment forms		—	—	—	—	—
39.3 Reads and comprehends wording on employment forms		—	—	—	—	—
39.4 Writes or prints neatly and legibly		—	—	—	—	—
40.0 <u>Prepares an Effective Resume (When Necessary)</u>						
40.1 Chooses resume format that highlights strengths		—	—	—	—	—
40.2 Creates structured, professional layout that is easy to read		—	—	—	—	—
41.0 <u>Demonstrates Effective Sales Approach in Interview Session</u>						
41.1 Investigates company before interview to obtain pertinent information		—	—	—	—	—
41.2 Answers standard interview questions with positive selling responses		—	—	—	—	—
41.3 Asks questions to obtain necessary information and to demonstrate interest		—	—	—	—	—
41.4 Presents a confident and professional image		—	—	—	—	—

Area 1  
Grooming and Attire

Lesson #	Topic
1	The relationship between how you look and how people view you
2	Selecting clothing which is appropriate attire for different situations
3	Clothing Care I (washing and drying instructions - how to read directions on detergents and washing machines)
4	Clothing Care II (washing and caring for wash and wear fabrics - touch-up ironing)
5	Clothing Care III (washing and caring for other fabrics)
6	Clothing repair (simple mending, closing rips and sewing on buttons)
7	(a) Hair care and styling (b) Relationship of hair style and other perception of you
8	(a) Hand and nail care (b) Dental and breath care
9	Importance of personal hygiene

Area 2  
Personal and Social Adjustment

Lesson #	Topic
1	Orientation to Project MEAL expectations and commitments
2	Introductions and manners
3	How others see you - how you look (clothing fit, colors, maintenance)
4	Setting short and long term goals (4 goal areas/steps to achieving goals)

Lesson #	Topic
5	Life's daily menu/vocabulary replacement (how to develop positive habit patterns and how to use positive vocabulary)
6	Simulated video-taped interview and critiques (what to do and not do in an interview)
7	Presentation by a panel of successful former project clients
8	Trust/trust walk (blindfolded client is guided around the facility by another client)
9	Skit development (clients write and produce own skits which are video taped - task encourages development of oral communication and body language skills and self-confidence). This activity is repeated each week during the Core Training Program).
10	Lifeboat/withholds (how to make decisions that enable you to live as opposed to giving up. Strategies for use in confronting and communicating with others including rules for giving and receiving criticism).
11	What I like about you/me. (Discussion of positive features of others and oneself including how to respond to compliments and praise).
12	Video commercial (writing and producing 30-60 second video-taped personal sales tool in which each client sells himself or herself).
13	Success and failure - the power of choice/cause and effect (clients prepare a collage which describes success and failure words).
14	Telephone interview techniques I.
15	Telephone interview techniques II.
<u>NOTE:</u>	Some lessons require several daily one hour instructional sessions.

Area 3  
Financial Planning/Transportation

Lesson #	Topic
1	How to set up a basic budget.
2	The project financial planning process - money management skills.
3	Preparing budget line items (food, recreation, clothing, housing, etc.).
4	Practical application of budgeting (actual preparation of a budget assuming full-time employment at minimum wage).
5	Comparative shopping techniques.
6	Hands-on field trip to a clothing and grocery store.
7	How to utilize public transportation.
8	Public transportation utilization field trip.
9	Use of public vs. private transportation (comparative real costs).
10	Reading and using city bus schedules.
11	How to access community services.
12	Safety practices and procedures (facility exit route, safety policies, actual fire drill - safety on public transportation and on the job).
<u>NOTE:</u>	Some lessons require several one hour daily instructional sessions.

Area 4  
Practical Law

Lesson #	Topic
1	Introduction: What are laws, who makes them and why?
2	(a) Types of laws: criminal, civil and administrative.



Lesson #	Topic
	(b) Categories of crimes: misdemeanors and felonies.
	(c) Recourses under civil law.
	(d) Settling disputes out of court.
3	(a) Constitutional rights and protections (equal protection, 5th Amendment, unlawful search, "Miranda" rights).
	(b) What to do if arrested.
4	(a) Selective Service requirements and registration.
	(b) Voter registration procedures.
5	(a) Consumer law: How law protects the consumer.
	(b) Warranties: Express and implied.
6	(a) Contracts: Definitions, types, necessary components.
	(b) Simulation (contract on selling or buying a private car).
	(c) Importance of proper receipts and record keeping.
7	Recourse for breach of contract/breach of warranty.
8	(a) Default on financial obligations and collection practices.
	(b) Rights and duties of landlords and tenants.
<u>NOTE:</u> Some lessons require several one-hour daily instructional sessions.	

#### Practical Law Resources

Arbetman, McMahon, and O'Brien. Street Law: A Course in Practical Law. West Publishing Company, 1980.

Furlong and McMahon. Consumer Law: Competencies In Law And Citizenship. West Publishing Company, 1982.

Area 5  
Home and Community Living

Lesson #	Topic
<b>Part I. Basic Home Maintenance</b>	
1	Floor and carpet care; (types of stains, basic cleaning methods, different chemicals and grease solvents).
2	(a) How to change faucet parts and how they work. (b) How to unplug and drain a toilet including plunger use. (c) Proper use of a garbage disposal. (d) Lock maintenance and repair.
3	Proper cleaning methods and materials for maintaining the bathroom area.
4	Proper cleaning methods and materials for maintaining the kitchen area.
5	(a) When and why to use a vacuum. (b) Vacuum repairs and maintenance (changing belts, emptying bags, cleaning beater bar, where to buy belts or parts, model number and type).
6	Apartment cleaning using procedures taught in Lessons 3 and 4 (Hands-on supervised in own apartment activity).
<b>Part II. Foods and Nutrition</b>	
1	Introduction: Basic Principles
2	Home safety tips.
3	Table manners and etiquette
4	Cook's checklist
5	Cooking terms
6	Measuring (use of cups and spoons)
7	Table setting
8	Sanitary food procedures

Lesson #	Topic
9	Nutrition just for you.
10	The road to good health.
11	The nutrients.
12	Nutrient teamwork.
13	The basic four food groups.
14	Buying and preparing breads and cereals.
15	Buying and preparing meats.
16	Buying and use of milk and dairy products.
17	Buying and preparing fruits and vegetables.
18	Buying and preparing other foods.
19	Basic meal plans.
20	Holidays and entertaining.
21	Your nutritional heritage.
22	Outdoor eating.
23	Meal planning (planning meals for a minimum wage budget).
24	(a) Planning balanced menu for 1 day. (b) Review of food groups and serving needs.
25	Planning a one week menu
26	(a) Making a food shopping list menu. (b) Estimating cost and staying within food budget
27	Reading food ads and using discount coupons.
28	Field trip to do comparison food shopping.
29	Field trip to do actual food shopping

**NOTE:** The clients prepare and eat their own lunch during many of the above lessons. The instructor also visits the clients' apartments to provide additional supervision of hands-on food preparation.

Lesson #	Topic
<b>Part III. Time Management</b>	
1	Time management techniques.
2	Planning a daily, weekly and monthly schedule.
3	Use of an appointment system to manage your time and meet your obligations
<b>Part IV. Financial Independence</b>	
1	Money management terms, budgeting and payroll deductions.
2	Budgeting on minimum wage income.
3	(a) How to choose a financial institution. (b) How to apply for and open a checking account. (c) Initial deposit. (d) Contract with bank. (e) Signature card.
4	(a) Introduction to checkbook simulation. (b) Importance of keeping accurate records.
5	Making out a deposit slip (Practice writing and spelling number words).
6	Checkbook simulation (components of a check, entering check in check register, using calculator to figure balance).
7	(a) Figuring costs and making change. (b) Estimating costs: Rounding off, adding and subtracting.
8	(a) Making change with coins and currency. (b) Calculating sales tax and gratuities.
9	Keeping accurate records for tax return preparation.
10	Checkbook simulation (making deposit with cash returned, use of automatic teller machine withdrawals).

Lesson #	Topic
11	Writing out a check and practice using a calculator to get the new balance.
12	(a) Savings (short-range and long-range) and types of savings. (b) Savings vs. investments.
13	(a) Selecting and using credit accounts. (b) Maintaining good credit. (c) When to close an account.

Area 6  
Job Development

Lesson #	Topic
<b>Part I. Work Attitudes and Awareness</b>	
1	Reasons why we work.
2	Why companies are in business.
3	Business structure and chain-of-command and employee responsibilities at various levels.
4	The real world of employer expectations, rules, and regulations.
5	Role playing of employee responsibilities and employer/employee relationship.

**Part II. Skills Analyses**

- 1 Job skills in terms of data and specific occupations - clients examine their thinking about their work histories and prepare list of skills they used in various jobs
- 2 Use of action verbs to describe job skills - revision and improvement of clients' lists of skills through the use of action verbs.
- 3 Examination of abilities in terms of psychological and physical conditions (stress, heat, heavy lifting) and roles in the work place (follower, leader, organizer, etc.) and have clients add these factors to their skills list.

Lesson #	Topic
4	Specific skills required to perform various jobs - knowledge acquired on the job.
5	Skills/abilities/knowledge acquired from work history.
6	Matching skills/abilities/knowledge to the needs of employers and specific target jobs

### Part III. Job Applications

- 1 Filling out job applications and examination of what employers look for when receiving job applications.
- 2 Collection of work history data - discussion of how to secure accurate detailed data.
- 3 Collection of personal references, data and permissions. Discussion of who makes a good reference and why. How to get good references.
- 4 EOE/AA sections of job applications and how to answer questions on disabilities. How to turn liabilities into assets.
- 5 How to answer open-ended questions on job applications in areas such as hobbies, interests, special training, experience, goals and likes and dislikes.
- 6 Completing the general question and answer section of a job application (age, bonds, FT/PT, felonies, penalty for lying, etc.). Presenting the application as a sales tool.

### Part IV. Resumes

1. Examination and discussion of resumes.
- 2 Selecting a format for writing a resume, selection of material to be included in a resume and completion of a rough draft of a resume.
- 3 Review of rough draft of resume and writing of a final draft.

Lesson #	Topic
----------	-------

## Part V. The Interview

- 1        Myths about employers and interviews. Discussion of the fear and intimidation surrounding the interview.
- 2        Discussion and practice of non-verbal communication, appearance, hygiene, eye contact, posture, handshake, facial expression, and body position skills for use during interviews.
- 3        Preparation of clients to recognize interview techniques and goals, and how to avoid pitfalls. How to begin thinking in terms of positive selling responses.
- 4        Practice in formulating and answering open-ended interview questions with positive, selling responses.
- 5        Practice in formulating and answering questions that are technically illegal. Positive selling responses to inappropriate questions.
- 6        Formulating questions to ask the interviewer. Questions that should not be asked.
- 7        Video taped practice interviews and critique.

## Part VI. Career and Job Search

- 1        Examine aptitude test data to identify clients' interests and salable skills.
- 2        Research career areas to determine prerequisites, entry levels, career paths and nature of various jobs.
- 3        Identify businesses and possible contacts which employ workers in jobs listed as potential opportunities.
- 4        How to utilize cold call phone strategies to create job opportunities.
- 5        How to examine want-ads to identify job market trends, exploitive ads, and valid leads.
- 6        Discussion and planning of networking strategies.



Instructional Schedule  
Week 1 of Project MEAL

Day	Time	Topic
Mon.	9:00 - 12:00 P.M.	Orientation
	12:00 - 1:30 P.M.	Lunch - Cleanup
	1:30 - 3:30 P.M.	Assessments
	4:30 - 5:30 P.M.	Apartment Maintenance
Tue.	9:00 - 12:30 P.M.	Assessments
	12:30 - 1:30 P.M.	Lunch - Cleanup
	1:30 - 3:30 P.M.	Time Management/Housekeeping
	3:30 - 4:30 P.M.	Introduction to Skit Preparation
	4:30 - 5:00 P.M.	Apartment Maintenance
Wed.	9:00 - 10:30 A.M.	Personal Data Collection
	10:30 - 12:00 P.M.	Introduction to Job Development
	12:00 - 1:30 P.M.	Lunch - Cleanup
	1:30 - 3:30 P.M.	Guest Speaker
	3:30 - 4:30 P.M.	Skit Development
	4:30 - 5:30 P.M.	Apartment Maintenance
Thurs.	9:00 - 10:30 A.M.	Personal Data Collection
	10:30 - 12:00 P.M.	IETEP Development
	12:00 - 1:30 P.M.	Lunch - Cleanup
	1:30 - 3:30 P.M.	IETEP Development (Free time for swimming for those who are finished)

## Chapter 6

### IETEP Development

An Individualized Education, Training, Employment Plan (IETEP) was developed for each client shortly after his or her enrollment in Project MEAL. This plan was developed under the direction of the clients' Case Manager in consultation with other R&D staff members. The IETEP form found on the following pages was used with Project MEAL participants. The IETEP is an adaptation of the IEP required by PL 94-142 for students enrolled in public school programs for the handicapped.

Section A of the IETEP contained a summary description of the rehabilitation problem(s) which required attention during the client's enrollment in Project MEAL. This summary statement was supplemental with a one or two page summary of the client's previous assessment data and employment history. These summaries were prepared by the Senior Case Manager for use during the staffing when the client's initial IETEP was developed. This summary was either attached to the IETEP or included in the client's file.

Section B of the IETEP contains a listing of the goals drafted for the client by the Case Manager and other Project MEAL staff members. These goals defined the major areas that required attention during the client's enrollment in the project.

Section C contains a description of the treatment services that were to be provided as part of the client's program of rehabilitation during enrollment in Project MEAL. The thirty-five item Treatment Needs form which appears later in this chapter was used to streamline development of this section of the IETEP. Completion of the listing of the agency and person responsible for delivering each of these required services was of great help when it came time to check to see if these services had been provided.

The specific service goals for the client were listed in Section D of the IETEP. Goals that were unique to the client were listed on the form. Competencies which were applicable to the general population being served by Project MEAL are included on the Competency Rating Scale which appeared in Chapter 5. Use of this rating scale to define many of the specific goals for the clients reduced the time required to develop the goals for each client. It also made it possible to devote additional attention to developing those goals which were unique to each client.

Section E of the IETEP contained a schedule for checking to see that required treatment or service outcomes were provided. Care must be taken to insure that support services needed by

the client are actually scheduled and provided and that their delivery is properly documented.

A listing of anticipated dates of the accomplishment of the goals specified for the individual client is included in Section F of the IETEP. This section provided a framework for monitoring each client's progress and mastery of the objectives outlined for the project.

Procedures and measures for use in determining that the treatments, services and training prescribed for the client were effective are listed in Section G of the IETEP. These included a variety of informal and formal strategies for determining if the desired behavioral changes had occurred.

Section H of the IETEP contains a listing of names of the Project MEAL staff members who were responsible for delivering and/or monitoring portions of the IETEP.

A copy of the one-page Case Management Staffing Report which was used during Project MEAL to document each staffing appears on the last page of this chapter.

## LIFE DEVELOPMENT INSTITUTE

Individualized Education, Training, Employment Plan (IETEP)

Client Name: \_\_\_\_\_

Date: \_\_\_\_\_

Social Security No.: \_\_\_\_\_

A. Rehabilitation Problem or the Individual's Presenting Need

B. Individual's Goals: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

C. Treatment or Services to be Provided:

(11/12/86)

D. Specific Service Goals: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

E. Time Intervals at which Treatment or Service Outcomes will be reviewed:

<u>Treatment/Service</u>	<u>Review Dated</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

F. Anticipated Time Frame(s) for the Accomplishment of the Individual's Specified Goals:

<u>Goal(s)</u>	<u>Time Frame</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

G. Measures to be Used to Assess the Effects of Treatment or Services:

<u>Treatment/Service</u>	<u>Measure</u>

H. Person(s) Responsible for Implementation of the Plan:

<u>Name</u>	<u>Responsibility</u>

# LIFE DEVELOPMENT INSTITUTE CLIENT SERVICE/TREATMENT NEEDS

## AGENCY/PERSON RESPONSIBLE

1. Advocacy	_____	_____
2. Alcoholism and drug abuse treatment services	_____	_____
3. Audiology	_____	_____
4. Chaplaincy	_____	_____
5. Dentistry	_____	_____
6. Dietary/nutrition	_____	_____
7. Driver training	_____	_____
8. Education	_____	_____
9. Guardianship or conservatorship	_____	_____
10. Independent living skills instruction	_____	_____
11. Interpretive services for those who are deaf or hearing impaired	_____	_____
12. Job placement	_____	_____
13. Manual communication instruction	_____	_____
14. Medication management	_____	_____
15. Mobility instruction for those who are blind or visually impaired	_____	_____
16. Nursing	_____	_____
17. Occupational skill training	_____	_____
18. Occupational therapy	_____	_____
19. Orthotics	_____	_____
20. Pharmacy	_____	_____
21. Physical therapy	_____	_____
22. Physician	_____	_____
23. Prosthetics	_____	_____
24. Psychological evaluation and treatment	_____	_____
25. Recreational	_____	_____
26. Rehabilitation counseling	_____	_____
27. Rehabilitation engineering	_____	_____
28. Residential	_____	_____
29. Social casework or group work	_____	_____
30. Specialized services for those who are deaf and blind	_____	_____
31. Speech-language pathology	_____	_____
32. Systems, production, and industrial engineering	_____	_____
33. Transportation	71	_____
34. Vocational evaluation	_____	_____
35. Work adjustment	_____	_____



LIFE DEVELOPMENT INSTITUTE  
CASE MANAGEMENT STAFFING REPORT

\*\*\*\*\*

NAME \_\_\_\_\_ GROUP \_\_\_\_\_ DATE \_\_\_\_\_

\*\*\*\*\*

VR COUNSELOR/PARENT \_\_\_\_\_

LDL CASE MANAGER \_\_\_\_\_

PURPOSE OF STAFFING \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\*\*\*\*\*

OUTCOME OF STAFFING \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\*\*\*\*\*

FURTHER ACTION \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

NEXT STAFFING SCHEDULED FOR: DATE \_\_\_\_\_ TIME \_\_\_\_\_

\*\*\*\*\*

SIGNED: \_\_\_\_\_

Case Manager

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## Chapter 7

### Tutoring Services

The academic tutoring component of Project MEAL was initially conceptualized as an individualized support service that would be provided for clients on an as-needed basis. Deficiency areas requiring assistance were identified in five ways: 1) Psychoeducational evaluation reports provided information needed to identify some of these areas; 2) Members of the project staff were able to identify areas in which tutorial assistance was needed; Additional deficiencies were identified; 3) during the clients' enrollment in skill training programs at the Maricopa Skill Center; and 4) during their early job placements. 5) One of the easiest and most productive ways of identifying areas in which the clients needed tutorial assistance was to ask them.

The key advantage of using the client's self identified problems as a basis for delivery of tutorial services was the client's belief that he or she had problems in these areas. The person who is willing to indicate that he or she needs help has already accomplished one of the most difficult tasks in developing this desired skill.

Difficulty was immediately encountered when clients were asked to participate in the tutorial program. Mention of anything that resembled the schools which had been the scene of many years of unpleasant failure experiences for the clients brought about immediate protests. It became apparent early in the project that a traditional basic skill development tutorial program was not acceptable to the clients. A modified approach that emphasized provision of assistance with development of job related academic and practical skills was adopted.

Scheduling tutorial services was also found to be a major problem. The large block of each day that was devoted to participation in the core training program greatly reduced the times when the clients could be scheduled for tutoring. This immediately meant that several clients who desired assistance with a wide range of different problems reported for tutoring at the same time. These sessions soon became more like classes that focused on a specific topic - one that was not always the area of concern to all of those in attendance. It was not possible to provide the diversity of instruction that was requested in the limited number of hours available for tutoring.

Scheduling tutoring sessions was further complicated by the work schedules of the clients who held late afternoon and evening jobs. Many times, those who needed to work with the tutor left for work at about the same time set aside for formal tutoring. Use of community volunteers was tried for awhile. The clients' failure to show up regularly for their sessions

without continual reminders and their changing work schedules soon discouraged these volunteers.

The strategy for providing tutoring services that worked best involved use of the Learning Center at the Maricopa Skill Center. Clients were referred to this facility for tutorial assistance as basic skill deficits were identified during their skill training program at the center. The services of the skill center were available throughout the day and were directly related to the training program in which the clients were enrolled. This relationship made it much easier to sell the clients on the need for developing the skills that they lacked.

Referral of project clients to community based agencies for the major part of their tutorial assistance made it possible for members of the Project HEAL staff to provide tutorial services to clients on a one-on-one basis. These tutoring sessions focused on specifics, like how to make change, and other topics identified by the clients and their core training program instructors. The tutor was able to go to the clients' apartments and provide direct instruction in practical skills like using measuring spoons and cups while baking a cake, caring for clothing, and personal hygiene.



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Life Development Institute

TUTORING PLAN

```

*****
*
* NAME _____ DATE _____ GROUP _____
*
* DESCRIPTION OF PROBLEM/S _____
*
* _____
*
* _____
*
** INSTRUCTIONAL GOALS*****
*
* GOAL 1. _____
*
* _____
*
* GOAL 2. _____
*
* _____
*
* GOAL 3. _____
*
* _____
*
** SCHEDULE****TUTORING BEGINS _____ *****ENDS _____*****
*
* MONDAY TUESDAY WEDNESDAY THURSDAY FRIDAY
*
* Time _____
*
* Time _____
*
** MATERIALS NEEDED*****
*
* _____
*
* _____
*
* _____
*
** EVALUATION OF PROGRESS***** Method ***** CAP *****
*
* Goal 1. _____
*
* Goal 2. _____
*
* Goal 3. _____
*
* REASON TERMINATED***** DATE _____*****
*
*
*****

```

Tutoring Plan Prepared By \_\_\_\_\_ Date \_\_\_\_\_

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## Chapter 8

### Financial Planning

Project MEAL clients were provided with two forms of financial planning assistance during the program. The first occurred in the form of instruction in budgeting and financial planning and resource management. This instruction was included in the core training program (discussed earlier in Chapter 5). The second was in the form of one-on-one financial planning which was provided for project participants who desired regular assistance in this area. The clients meet on a weekly basis with the financial planner to discuss projected income, expenses, and the previous week's expenditures.

During the first visit, the client and financial planner filled out the Financial Planning Work Sheet which appears later in this chapter. The estimated income for a month is computed by multiplying the rate of pay, by the number of hours the client will be working, by 4.3. Estimated taxes are deducted to determine the client's real income (take home income).

The clients then developed a list of monthly costs and a budget that would enable them to pay their rent, food, laundry, clothes, transportation, medical bills, etc. Those who are paying off medical bills, loans or court ordered financial restitution are assisted in setting up a budget item and payment schedule for retiring these obligations.

Clients were encouraged to develop the habit of saving a portion of their income and were assisted in opening savings accounts with local banks and/or savings and loan institutions.

The Research and Development Training Institutes provided its clients with the services of an escrow account. This account was a non-interest earning short-term savings account that the client could make deposits to for future use. This account was used by clients who wished to set aside money for use at the beginning of the next month for rent, food, utilities or to make a special purchase. It also provided clients with an opportunity to gradually build up funds needed for making insurance payments on their cars and to pay the deposit on an apartment when they were ready to live independently.

A typical discussion between a client and the financial planner might go like this:

Client: "I want to buy a new headset for my stereo."

F.P.: "How much will it cost?"

Client: "About \$24.95."

F.P.: "Do you have that much money?"

Client: "Yes."

F.P.: "Will you have enough money left to pay for your food and bus fare to work until you get paid again?"

Client: "Let's see. . . (client figures for a minute) . . . no."

F.P.: "Is there a way you can get the money together to make this purchase?"

Client: "Well, I could save up some money for it."

F.P.: "How much a week could you afford to save for it?"

Client: "About \$5.00."

F.P.: "How long would that take you?"

Client: "Five or six weeks."

F.P.: "Do you want it that bad?"

Client: "Yes."

F.P.: Explains the escrow account and asks the client if he wants to put \$5.00 a week in it until there is enough to buy the new headset.

Client: "That sounds o.k. to me." (Gives the Financial Planner \$5.00 for the first week).

When the money in the client's escrow account reached the amount that was earmarked for purchase of a headset, the client withdrew the money in cash and made the purchase. Such experiences teach the value of planning one's expenditures, saving and paying cash. They also emphasize avoidance of consumer debt associated with borrowing money from financial institutions or friends.

Use of the escrow account for short term saving of small amounts of money is often the first time the clients have trusted someone else to hold their money for them. Such an act, which consists of the exchange of tangible cash that they can hold in their hands for a piece of paper with a number on it is a big step for many clients. This experience is an important prerequisite to opening a checking, or savings account with a stranger at a bank or savings and loan institution.

A copy of the Financial Planning Worksheet was given to the client at the end of each visit with the Financial Planner when a revision was made. This data was then placed on a copy of the Client's Budget Worksheet. This more detailed record made it possible for the Financial Planner to view the week to week evolution of the client's earnings and budget. It was helpful to make a brief summary note following each financial planning session with a client. This was done by recording dated notes on the back side of the Client's Budget Worksheet following each session. This provided valuable documentation of the client's thinking about the management of their finances and a record of the counsel that was given by the Financial Planner.

The low earning power of the clients makes it essential that their limited resources be managed well and that consumer debt be avoided. Failure to plan is almost certain to lead to failure to be able to pay for food, and bus tokens at the end of the time period between paydays, and to lack funds needed to pay the next month's rent. Emphasis on financial planning was a highly essential program component.



# FINANCIAL PLANNING WORK SHEET

Itemized Expenses	Mo.\$	Wkly.\$	
1. Rent			
2. Food			
3. Misc.			
4. Trans.			
5. Med. Exp.			
6. Cushion			
7. Utilities			
8. Savings			
9. Pocket \$			
10.			
11.			
12.			

Formula to get monthly cost from weekly cost:  $\text{Wkly. \$} \times 4.3 = \text{monthly cost.}$

Formula to get weekly cost from monthly cost:  $\text{Mo. \$} \times 4.3 = \text{weekly cost.}$

WORK SHEET:

Escrow \_\_\_\_\_

Savings \_\_\_\_\_

Self \_\_\_\_\_

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## CLIENT BUDGET WORKSHEET

\*\*\*\*\*  
\*  
\* NAME \_\_\_\_\_ PAY PERIODS: \_\_\_\_\_ Daily \_\_\_\_\_ Weekly \_\_\_\_\_ Bi-Weekly \_\_\_\_\_ Monthly \*  
\*  
\* BUDGET PERIOD: \_\_\_\_\_ Week \_\_\_\_\_ Bi-Week \_\_\_\_\_ Month FINANCIAL PLNG APPTMNT: Day of Week \_\_\_\_\_ Time \_\_\_\_\_ \*  
\*\*\*\*\*  
\* PAY DAYS: 1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_ 5. \_\_\_\_\_ 6. \_\_\_\_\_ 7. \_\_\_\_\_ \*  
\*  
\* ESTIMATED TAKE HOME PER PAY PERIOD \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_ \*  
\*\*\*\*\*

	Monthly Cost	Weekly Cost	Budget 1.	Budget 2.	Budget 3.	Budget 4.	Budget 5.	Budget 6.	Budget 7.
BUDGET ITEMS ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( )									
1. Rent	\$	\$	\$	\$	\$	\$	\$	\$	\$
2. Food	\$	\$	\$	\$	\$	\$	\$	\$	\$
Transportation									
3. Or Car Expense	\$	\$	\$	\$	\$	\$	\$	\$	\$
4. Utilities	\$	\$	\$	\$	\$	\$	\$	\$	\$
5. Add To Escrow	\$	\$	\$	\$	\$	\$	\$	\$	\$
6. Savings	\$	\$	\$	\$	\$	\$	\$	\$	\$
7. Laundry	\$	\$	\$	\$	\$	\$	\$	\$	\$
Spending									
8. Money	\$	\$	\$	\$	\$	\$	\$	\$	\$
9.	\$	\$	\$	\$	\$	\$	\$	\$	\$
10	\$	\$	\$	\$	\$	\$	\$	\$	\$
TOTALS	\$	\$	\$	\$	\$	\$	\$	\$	\$

Encl Plnrs Intl

## Chapter 9

### Job Development

The Job Developer began working with each Project MEAL participant early during his or her enrollment in the Core Training Program. The Job Developer's first interview with a new client focused on a review of his or her previous employment experiences, satisfaction level and levels of success. The client's job interests and dislikes were also discussed during this initial interview. In some cases, it was possible, during the initial interview, to identify behavioral patterns and attitude problems that required attention during the job preparation of the Core Training Program. Information gathered during the initial interview and contacts with the client that followed were recorded on the Job Development Report form which appears later in this chapter.

#### The Job Development Report

The "vocational skills and limitations" section of the Job Development Report was completed following receipt of the "vocational evaluation report" from the Maricopa Skill Center. Information was gathered about the client's skills and limitations during staffings and conversations with other members of the Research and Development Training Institute staff.

The next step in job development focused on determining the client's need for additional training. The specific type of training that was needed by the client, the location where the training could be secured, and when the client would enroll were added to the Job Development Report form. Care was taken to insure that the training program selected for a client was compatible with both the client's interests and vocational aptitudes.

The Job Developer identified several possible jobs and potential employers while the client was enrolled in skill training. This listing of possible jobs and employers was reviewed with the client periodically during his or her enrollment in the skill training portion of the project.

The completed Job Development Report with its listing of updated job possibilities that were compatible with the client's interests and skills was used to help the client find a job following completion of skill training.

#### Documentation of Job Interview

Project MEAL clients' interviews were documented on the Documentation of Job Interview form. Use of this form made it possible to identify the type of jobs each client sought,

where the job was located and how the interview was secured. This form also included space for describing the terms of the job and an indication of whether the client was hired or not.

### Record of Job Placement

A copy of the Record of Job Placement was completed as soon as a client obtained a new job. Documentation regarding the job title, employer and location were entered on this form. The name of the person's supervisor, and the supervisor's title and phone number were recorded for use of the job tracker who would follow up the client. Job tracking is discussed in Chapter 10.

The description of the "job terms" section of the Record of Job Placement contained information needed during the client's weekly meetings with the Financial Planner. The "transportation" section of this form contained information needed by the "Transportation Clerk" in those cases where the client required transportation to and from work in the R&D Training Institutes' van.

Immediate completion of the Record of Job Placement form and forwarding of a copy to each of the persons listed at the bottom of the form was found to be essential. Delay in doing so created immediate transportation problems in those cases where the client required this form of assistance. It also caused a delay in the initiation of "job tracking" that could be critical if the client experienced difficulty in adjusting to the new job.

### Job Termination Report

Unfortunately, all job placements were not successful. In other cases, successful placements end when the need for an employee ended or the person was promoted to another position. The Job Termination Report was completed by the "job developer" during a "termination review" with the client. The form was designed to facilitate recording of information about the job title, name of the employer and supervisor, reason for termination, quitting or firing.

This documentation of information gathered during the termination review was a valuable source of data needed to determine if the client needed further training, job adjustment counseling or placement in another type of position or with a different employer.

### Job Placement and Turnover Report

The Job Developer used the Job Placement and Turnover Report to maintain a record of each new placement and job termination

or change. Use of this form made it possible for the Job Developer to maintain a record of the job status of each active R&D Training Institute client. It also facilitated preparation of a monthly report of new placements, terminations and upgrades.

The job development and job tracking services were continued until the client had developed a track record of successful employment. These services continued through one or more job upgrades which moved the clients through successive steps toward full-time employment which was commensurate with their abilities and interests. In those cases, where a client continued to experience difficulty in maintaining sustained employment, the support of the Job Developer and Tracker was required over an extended time.

#### Letters to Sponsoring Agencies

The three form letters at the end of this Chapter were used to keep the agencies which were sponsoring the clients informed about job placements, terminations, and to let them know when the client had been working on the same job for sixty days. Careful coordination between the Job Developer and Job Tracker was found to be necessary to assure the completion and timely mailing of these letters.

#### Job Bank Listing

Development of a listing of jobs former R&D Training Institute clients had held and a listing of prospective jobs which future clients might hold was an important part of the Job Developer's responsibilities. These listings provided a valuable resource during the development of Job Development Reports for clients who had recently enrolled in the program.

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## JOB DEVELOPMENT REPORT (Page 1)

\*\*\*\*\*  
\*  
\* NAME \_\_\_\_\_ DATE \_\_\_\_\_ GROUP \_\_\_\_\_ \*  
\*  
\* PROGRAM/S: \_\_\_\_\_ Core Training \_\_\_\_\_ 9 Month \_\_\_\_\_ Project MEAL \*  
\*\*\*\*\*

## PREVIOUS EXPERIENCE/SATISFACTION/SUCCESS

\*\*\*\*\*  
\*  
\* Position Employer Length Level of Satisfaction Level of Success \*  
\*  
\*  
\*  
\*  
\*  
\*  
\*  
\*\*\*\*\*

## JOB INTERESTS/DISLIKES

\*\*\*\*\*  
\*  
\* Interests Dislikes \*  
\*  
\*  
\*  
\*  
\*  
\*  
\*  
\*\*\*\*\*

## VOCATIONAL SKILLS AND LIMITATIONS

\*\*\*\*\*  
\*  
\* Skills Limitations \*  
\*  
\*  
\*  
\*  
\*  
\*  
\*  
\*\*\*\*\*

## ADDITIONAL TRAINING NEEDED

\*\*\*\*\*  
\*  
\* What Where When \*  
\*  
\*  
\*  
\*  
\*  
\*  
\*  
\*\*\*\*\*

Continued On The Other Side

## JOB DEVELOPMENT REPORT (Page 2)

\*\*\*\*\*  
 \*  
 \* NAME \_\_\_\_\_ DATE \_\_\_\_\_ GROUP \_\_\_\_\_  
 \*\*\*\*\*

## POSSIBLE JOBS AND EMPLOYERS

\*\*\*\*\*  
 \* Job Title Listing DOT # Potential Employers \*  
 \*  
 \*  
 \*  
 \*  
 \*  
 \*  
 \*  
 \*  
 \*  
 \*  
 \*  
 \*\*\*\*\*

## POSSIBLE JOBS AND EMPLOYERS Update #1 on (\_\_\_\_\_)

\*\*\*\*\*  
 \* Job Title Listing DOT # Potential Employers \*  
 \*  
 \*  
 \*  
 \*  
 \*  
 \*  
 \*\*\*\*\*

## POSSIBLE JOBS AND EMPLOYERS Update #2 on (\_\_\_\_\_)

\*\*\*\*\*  
 \* Job Title Listing DOT # Potential Employers \*  
 \*  
 \*  
 \*  
 \*  
 \*  
 \*  
 \*\*\*\*\*

## PLAN APPROVAL

\*\*\*\*\*  
 \*  
 \* CLIENT \_\_\_\_\_ DATE \_\_\_\_\_  
 \*  
 \* JOB DEVELOPER \_\_\_\_\_ DATE \_\_\_\_\_  
 \*  
 \* PROGRAM DIRECTOR \_\_\_\_\_ DATE \_\_\_\_\_  
 \*  
 \* DATE \_\_\_\_\_  
 \*\*\*\*\*

Copies To: Client, Client's File, Funding Agency, Job Developer, Prog. Dir.

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## DOCUMENTATION OF JOB INTERVIEW

\*\*\*\*\*

\* CLIENT'S NAME \_\_\_\_\_ DATE \_\_\_\_\_ \*

\* PROSPECTIVE JOB \_\_\_\_\_ EMPLOYER \_\_\_\_\_ \*

\* ADDRESS \_\_\_\_\_ PHONE \_\_\_\_\_ \*

\* HOW WAS THE JOB LOCATED? \*

\* \_\_\_\_\_ Job Developer \_\_\_\_\_ A Sign In The Window \_\_\_\_\_ A Want Add \*

\* \_\_\_\_\_ A Friend ( Who? \_\_\_\_\_ ) \_\_\_\_\_ SWIBRA \*

\* \_\_\_\_\_ DVR Other( \_\_\_\_\_ ) \*

\* HOW WAS THE INTERVIEW SECURED? \*

\* \_\_\_\_\_ Client Made Appointment \_\_\_\_\_ Job Developer Made Appointment \*

\* \_\_\_\_\_ Another R & D Staff Member Made The Appmnt (Who? \_\_\_\_\_) \*

\* \_\_\_\_\_ A Friend Made The appmnt (Who? \_\_\_\_\_) \*

\* \_\_\_\_\_ Other Person ( Who? \_\_\_\_\_) \*

\* JOB TERMS \*

\* Pay Rate \$ \_\_\_\_\_/hour Hours \_\_\_\_\_/Week Benefits ( Y N ) \*

\* Probation Period ( Y N ) Length \_\_\_\_\_ \*

\* Other \_\_\_\_\_ \*

\* HIRE/NON-HIRE \*

\* HIRED \_\_\_\_\_ START DATE \_\_\_\_\_ NON-HIRE \_\_\_\_\_ \*

\* REASON FOR NON-REHIRE \_\_\_\_\_ \*

\* \_\_\_\_\_ \*

\* If position wasn't suitable, are other suitable positions available \*

\* with the employer? (Describe \_\_\_\_\_) \*

\* Was the employer made aware of possible: OJT Funding ( Y N ) \*

\* TJTC Certification ( Y N ) \*

\*\*\*\*\*

Information Recorded By : \_\_\_\_\_ Date \_\_\_\_\_



# R and D Training Institutes Life Development Institute

## RECORD OF JOB PLACEMENT

\*\*\*\*\*  
\*  
\* NAME \_\_\_\_\_ DATE \_\_\_\_\_ RECORDED BY \_\_\_\_\_ \*  
\*  
\*\*\*\*\*

## JOB AND EMPLOYER

\*\*\*\*\*  
\*  
\* JOB \_\_\_\_\_ EMPLOYER \_\_\_\_\_ \*  
\* \_\_\_\_\_ Closest Major \_\_\_\_\_ \*  
\* ADDRESS \_\_\_\_\_ INTERSECTION \_\_\_\_\_ \*  
\*\*\*\*\*

## SUPERVISOR

\*\*\*\*\*  
\*  
\* SUPERVISOR \_\_\_\_\_ TITLE \_\_\_\_\_ PHONE \_\_\_\_\_ \*  
\*  
\*\*\*\*\*

## JOB TERMS

\*\*\*\*\*  
\*  
\* START DATE \_\_\_\_\_ WORK HOURS: Begin \_\_\_\_\_ End \_\_\_\_\_ \*  
\*  
\* DAYS OF WEEK \_\_\_\_\_ AM/PM \_\_\_\_\_ FULL/PART TIME \_\_\_\_\_ \*  
\*  
\* HOURLY PAY RATE \$ \_\_\_\_\_ 1ST PAYDAY \_\_\_\_\_ PAY MODE: \_\_\_\_\_ Daily \*  
\*  
\* \_\_\_\_\_ Weekly \_\_\_\_\_ Twice Monthly \_\_\_\_\_ Monthly WILL RECEIVE REGULAR \*  
\*  
\* WORK SCHEDULE BY: \_\_\_\_\_ ESTIMATED LENGTH OF JOB \_\_\_\_\_ \*  
\*\*\*\*\*

## TRANSPORTATION NEED

\*\*\*\*\*  
\*  
\* WILL GET TO JOB BY: \_\_\_\_\_ Public Transit \_\_\_\_\_ Personal Vehicle \*  
\*  
\* \_\_\_\_\_ R & D Van \_\_\_\_\_ Walking \_\_\_\_\_ TAXI \_\_\_\_\_ With a \*  
\*  
\* A Friend (Who? \_\_\_\_\_ ) \_\_\_\_\_ Employer Will Pick Up \*  
\*  
\* Other Arrangement/s \_\_\_\_\_ \*  
\*\*\*\*\*  
\*  
\* Placement Documented By \_\_\_\_\_ Date \_\_\_\_\_ \*  
\*\*\*\*\*

Copies To: Transportation Clerk, Job Developer, Job Tracker, Financial  
Planning, Client's File \_\_\_\_\_

# R and D Training Institutes Life Development Institute

## JOB TERMINATION REPORT

\*\*\*\*\*

\* NAME \_\_\_\_\_ DATE \_\_\_\_\_ RECORDED BY \_\_\_\_\_ \*

\* JOB \_\_\_\_\_ EMPLOYER \_\_\_\_\_ \*

\* ADDRESS \_\_\_\_\_ SUPERVISOR \_\_\_\_\_ \*

\* SUPERVISOR'S TITLE \_\_\_\_\_ PHONE \_\_\_\_\_ \*

\*\*\*\*\*

## TERMINATION REVIEW

\*\*\*\*\*

\* REASON TERMINATED: \_\_\_\_\_ Client Quit \_\_\_\_\_ Was Fired \_\_\_\_\_ Terminated At End \_\_\_\_\_ \*

\* Of Probationary Period \_\_\_\_\_ Job Ended \_\_\_\_\_ Promoted To Another Job \_\_\_\_\_ \*

\* REASON QUIT: \_\_\_\_\_ Conflict With Supervisor \_\_\_\_\_ Conflict With Other \_\_\_\_\_ \*

\* Workers \_\_\_\_\_ Didn't Know What To Do \_\_\_\_\_ Didn't Follow Directions \_\_\_\_\_ \*

\* \_\_\_\_\_ Reading Probs. \_\_\_\_\_ Math Probs. \_\_\_\_\_ Writing Difficulty \_\_\_\_\_ \*

\* \_\_\_\_\_ Work Is Too Fast \_\_\_\_\_ Had Unsolvable Transportation Problem \_\_\_\_\_ \*

\* \_\_\_\_\_ Too Much Lifting \_\_\_\_\_ Too Much Heat \_\_\_\_\_ Too Much Noise \_\_\_\_\_ \*

\* \_\_\_\_\_ Got A Better Job \_\_\_\_\_ ( \_\_\_\_\_ ) \_\_\_\_\_ \*

\* REASON Fired: \_\_\_\_\_ Conflict With Supervisor \_\_\_\_\_ Conflicts With Other \_\_\_\_\_ \*

\* Workers \_\_\_\_\_ Didn't Learn To Do Job \_\_\_\_\_ Wouldn't Follow Directions \_\_\_\_\_ \*

\* \_\_\_\_\_ Worked Too Slow \_\_\_\_\_ Frequently Late \_\_\_\_\_ Bad Attitude \_\_\_\_\_ \*

\* \_\_\_\_\_ Reading Probs. \_\_\_\_\_ Math Probs. \_\_\_\_\_ Diff. With Writing \_\_\_\_\_ \*

\* \_\_\_\_\_ Job Was Discontinued \_\_\_\_\_ Lacked Physical Stamina To Do Job \_\_\_\_\_ \*

\* \_\_\_\_\_ ( \_\_\_\_\_ ) \_\_\_\_\_ \*

\* REMARKS: \_\_\_\_\_ \*

\* \_\_\_\_\_ \*

\* \_\_\_\_\_ \*

\* \_\_\_\_\_ \*

\* NAME OF PERSON CONDUCTION REVIEW \_\_\_\_\_ DATE \_\_\_\_\_ \*

\*\*\*\*\*

Copies To: Transportation Clerk, Job Developer, Job Tracker, Financial Planning, Client's File \_\_\_\_\_

## For the Month of

[illegible]

```
*****
* Action Type Code: P = Placement      T = Termination      UGSE = Upgrade      *
*                with same employer    UGNE = Upgrade with new employer      *
*****
```

Continued on Back of Page

JOB PLACEMENT AND TURNOVER REPORT (page 2)

For the Month of

\*\*\*\*\* For the Month of \*\*\*\*\*

[illegible]

\*\*\*\*\*

\* Active placements at start of month \_\_\_\_\_ \*

\* \* \* \* \*

\* \* Number of new placements during the month \_\_\_\_\_

\* \* \* \* \*

\* \* Number of terminations during the month \_\_\_\_\_ \*

\* Active placements at end of month \_\_\_\_\_

\* Upgrades (promotions) with same employer \_\_\_\_\_ \*

\* Upgrades (promotions) with new employer(s) \_\_\_\_\_

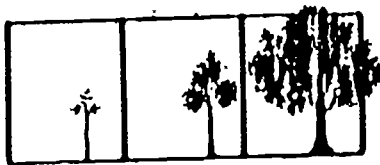
\* Total Upgrades (promotions) during month \_\_\_\_\_ \*

\* Action Type Code: P = Placement    T = Termination    UGSE = Upgrade

\* Action type code: 1 Placement  
\* with same employer UGNE = Upgrade with new employer  
\*\*\*\*\*

\*\*\*\*\*

Copies To: Program Director, Job Developer



Research & Development  
Learning Institutes, Inc.  
Serving K-12 Schools and Adults with Learning Difficulties

Dear \_\_\_\_\_:

This letter is to inform you of the placement status of

\_\_\_\_\_. The employer is \_\_\_\_\_

and \_\_\_\_\_ position is \_\_\_\_\_.

This employment started \_\_\_\_\_ at \$ \_\_\_\_\_  
per hour, working approximately \_\_\_\_\_ hours per week.

We are expecting this job will prove to be a successful placement and will keep you informed of further developments. We will continue to track \_\_\_\_\_ and are prepared to lend a hand if needed.

If you have any questions, please feel free to call.

Sincerely,

George Roybal  
Placement Director

LBF:vh

P.O. Box 15112  
Phoenix, AZ 85060

88

93



Research & Development  
Training Institutes, Inc.

500 N. 1st Avenue, Suite 100, Phoenix, Arizona 85004

Dear \_\_\_\_\_:

This is to inform you of the termination of \_\_\_\_\_  
\_\_\_\_\_. The employer was \_\_\_\_\_  
and \_\_\_\_\_ position was \_\_\_\_\_.  
\_\_\_\_\_ was the  
stated reason for termination.

The termination was effective as of \_\_\_\_\_. We  
will continue to work with \_\_\_\_\_ in hopes of placing  
in another position.

Please contact me at my office if you have any questions.

Sincerely,

George Rovbal  
Placement Director

LBF:vh

P.O. Box 15112  
Phoenix, AZ 85060

Program Telephone: (602) 956-8331

Executive Offices Telephone: (602) 955-2920



**LIFE DEVELOPMENT INSTITUTE**

A Division of Research and Development  
Training Institutes, Inc.

Date: \_\_\_\_\_

Dear \_\_\_\_\_:

\_\_\_\_\_ has been employed for sixty days as of  
\_\_\_\_\_ with \_\_\_\_\_.

We will continue to track \_\_\_\_\_ progress for a period of  
up to six months. If you should have any questions, please do not  
hesitate to contact my office.

Sincerely,

George Roybal

Placement Director/Job Developer

P.O. Box 15112  
Phoenix, AZ 85060

Program Telephone (602) 956-8334

Administrative Offices Telephone (602) 955-2920



95 **CNE**  
Educational Programs Accredited by the Council for Noncollegiate Continuing Education  
A national accrediting agency listed by the U.S. Secretary of Education

R and D Training Institutes  
Life Development Institute

## JOB BANK LISTING

\*\*\*\*\*  
\*  
\* EMPLOYER \_\_\_\_\_ CONTACT PERSON \_\_\_\_\_ PHONE \_\_\_\_\_ \*  
\*  
\* ADDRESS \_\_\_\_\_ CONTACT PERSON \_\_\_\_\_ \*  
\*  
\*\*\*\*\*

Job Title	Starting Pay	Probation Period	Chance For Advancement	Prior Success Of Clients on Job
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

\*\*\*\*\*

REMARKS:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\*\*\*\*\*

LISTING RECORDED BY: \_\_\_\_\_ TITLE \_\_\_\_\_ DATE \_\_\_\_\_



## Chapter 10

### Job Tracking

Tracking of each Project MEAL client was a key program component which helped insure successful job placement and sustained employment. Tracking began on the client's first day or the day after the first day of employment and continued for at least six months. Failure to implement this important activity would have greatly reduced the percentage of the clients who remained successfully employed.

Tracking began on the first day of employment with a phone call to the contact person listed on the Job Placement form. During this phone call, the Job Tracker, who was also the Placement Director, checked to determine if the client 1) showed up for work, 2) was on time, 3) arrived properly groomed, 4) was properly dressed, 5) required assistance in developing job related skills, 6) had any problems, etc. An important part of the first job tracking contact with the client's employer was explanation of the reason for making the phone call and indication of who will be making future follow-up calls and how often.

Development of a good working relationship between the Job Tracker and the contact person is of vital importance. The contact person should be given the Tracker's name and phone number so that any problem the client is having on the job can be immediately made known to the Job Tracker. By doing so, the contact person in essence becomes an extension of the Project MEAL staff. It becomes necessary to identify problems a client is having on the job before they result in termination and yet another failure for the client. The availability of this information made it possible to institute immediate interventions in the form of instruction designed to develop the needed skill and/or counseling to correct misconceptions and attitude problems.

When needed, a Project MEAL staff member accompanied the client to his or her place of employment when a job tracking contact had identified a problem that required further analysis or on-site job coaching. One such visit was made when a job tracking contact indicated that a client was about to be terminated from a position as a hotel maid. A discussion with the client's supervisor soon identified the problem the client was having in making beds. The supervisor explained the procedure to the Project MEAL staff member who then demonstrated it to the client. After a few attempts, the client was able to meet the expected standard of performance. At the same time, the supervisor was supplied with a procedure for further instructing the client that could be used when additional training was needed. The client became one of the housekeeping department's

best employees, and was recognized at one time as "employee of the month."

Job tracking contacts were made on a weekly basis during the first three weeks of employment. The frequency of contacts was reduced to every other week during the next month and then to once a month in those cases where the client was successfully employed. Tracking continued for six months or until the client was successfully transitioned to sustained employment.

Timely job tracking made it possible to develop an ongoing relationship with key employers who have positions in which future clients can be placed. These contacts make it possible to identify additional job possibilities for current and future clients. Early identification of difficulties clients were having made it possible to assess the appropriateness of their placements and to make needed reassignments. Early reassignment of clients, when needed, helped insure the client's success and helped keep the door open with the employer as a site where other clients could be placed.

Feedback from employers regarding clients who were enrolled in or who have completed the core training program was a valuable source of the information needed to determine if the content of this program was meeting the needs of the clients. Suggestions received during tracking contacts provided an ongoing source of information and ideas about needed modifications and additions to the curriculum.

Organization was a key step in effective job tracking. This was facilitated by setting up a notebook that contained all of the tracking records. The three forms shown on the following pages were used during tracking.

The Job Tracker did two things as soon as a completed Job Placement form was received from the Job Developer. The client's name and job identification data was filled in on a copy of the "Job Tracking Record" and the form was placed in the appropriate location in the tracker's notebook. Then the 45th and 60th days from the client's start date were determined and placed in a tickler file. This system provided the information needed when it was time to let the client's vocational rehabilitation counselor know about his or her progress.

Placement of the client's Job Tracking Records form in alphabetical order in a section of the tracker's notebook helped facilitate systematic tracking of all clients. The only variation to this procedure was the creation of notebook sections where all of the Job Tracking Records for an employer who employs several clients could be located. The Log of Job Placements By Employer form was provided for use at the front of each employer's specific section of the notebook. Use of this form

made it possible to quickly identify all of the clients who could be tracked during one call to a contact person. It was important to be organized so that all of the clients who need to be tracked could be discussed during a single call to a contact person. Several contact persons might need to be contacted while tracking all of the clients placed with a large employer.

The Job Tracker completed the Tracking Feedback For Job Developer form as each tracking contact was made for the day. This record of the day's contacts provided immediate feedback to the Job Developer regarding the status on each client who was employed. A four level status legend was used that included: 1) doing fine, 2) employer wants a call from the Job Developer, 3) client is on shaky ground - Job Developer needs to call, and 4) RED ALERT - CALL NOW - client has been terminated or was on the brink of being terminated. This legend provided the Job Developer and other staff members with a means of quickly identifying clients who needed assistance.

R and D Training Institutes  
Life Development Institute

## JOB TRACKING RECORD

\*\*\*\*\*  
\*  
\* CLIENT'S NAME \_\_\_\_\_ JOB \_\_\_\_\_ START DATE \_\_\_\_\_ \*  
\*  
\* EMPLOYER \_\_\_\_\_ ADDRESS \_\_\_\_\_ PHONE \_\_\_\_\_ \*  
\*  
\* DVR COUNS \_\_\_\_\_ PHONE \_\_\_\_\_ 45th Day On Job \_\_\_\_\_ \*  
\*  
\* Date 45th Day Call Made To Counselor \_\_\_\_\_ 60th Day On Job \_\_\_\_\_ \*  
\*  
\* Follow Up Call Date \_\_\_\_\_ Date Tracking Completed \_\_\_\_\_ \*  
\*\*\*\*\*

DATE \_\_\_\_\_ TRACKER \_\_\_\_\_ PERSON SPOKEN TO \_\_\_\_\_  
RESPONSE: \_\_\_\_\_

DATE \_\_\_\_\_ TRACKER \_\_\_\_\_ PERSON SPOKEN TO \_\_\_\_\_  
RESPONSE: \_\_\_\_\_

DATE \_\_\_\_\_ TRACKER \_\_\_\_\_ PERSON SPOKEN TO \_\_\_\_\_  
RESPONSE: \_\_\_\_\_

DATE \_\_\_\_\_ TRACKER \_\_\_\_\_ PERSON SPOKEN TO \_\_\_\_\_  
RESPONSE: \_\_\_\_\_

DATE \_\_\_\_\_ TRACKER \_\_\_\_\_ PERSON SPOKEN TO \_\_\_\_\_  
RESPONSE: \_\_\_\_\_

DATE \_\_\_\_\_ TRACKER \_\_\_\_\_ PERSON SPOKEN TO \_\_\_\_\_  
RESPONSE: \_\_\_\_\_

R and D Training Institutes  
Life Development Institute

## LOG OF JOB PLACEMENTS (BY EMPLOYER)

\*\*\*\*\*  
\*  
\* EMPLOYER \_\_\_\_\_ ADDRESS \_\_\_\_\_ PHONE \_\_\_\_\_ \*  
\*  
\*\*\*\*\*

#	Client's Name	JOB	Contact Person	Phone	Date Started	Date Ended
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
11.						
12.						
13.						
14.						
15.						
16.						
17.						
18.						
19.						
20.						

R and D Training Institutes  
Life Development Institute

TRACKING FEEDBACK FOR JOB DEVELOPER

\*\*\*\*\*  
\*  
\* TRACKING DATE \_\_\_\_\_ TRACKER \_\_\_\_\_  
\*  
\*\*\*\*\*

#	Client's Name	Phone #	Status	Remarks
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				
16.				
17.				
18.				
19.				
20.				

\*\*\*\*\*  
\* STATUS LEGEND: \*  
\* 1. Doing fine 2. Employer wants call from job developer 3. Client on \*  
\* shaky ground - Job developer needs to call 4. RED ALERT - CALL NOW - \*  
\* client has been terminated or on the brink of being terminated. \*  
\*\*\*\*\*

## Chapter 11

### Problems Encountered While Conducting Project MEAL

Those who wish to develop a post-secondary level transition program like Project MEAL can expect to cope with a wide range of problems. Some of the problems encountered during Project MEAL are examined in the following discussion.

#### Linkage Development

Considerable time was required for development of linkages with agencies that provide services for adolescents and young adults who were experiencing transition problems. This developmental activity required numerous personal contacts with public school special educators and vocational rehabilitation counselors. The relationships developed during these networking efforts provided the basis for the referrals that were needed to operate the program.

It was necessary to nurture these linkages following the initial contacts. Failure to do so usually resulted in rapid deterioration of the relationship and lack of further contact from these potential resources.

The development of linkages with potential referral sources must be accompanied by development of linkages with agencies where the clients can be placed for training. These additional linkages also need to involve development of contacts with agencies that have the funds needed to pay for the client's training. Identification of potential employers for future clients also needs to be initiated well before the time when the first client is ready for placement.

#### Identification of Prospective Clients

Early in Project MEAL, it became clear that there were thousands of learning disabled adolescents who were nearing the point where they would exit high school. Development of the relationships with school officials that were needed to have these individuals referred to the project proved to be minimally productive. It proved to be easy to develop a congenial professional relationship with these decision makers, and equally difficult to generate referrals. It became clear that many of these individuals did not view arranging for post-secondary school transition services for their students to be a part of their responsibilities.

This problem was eventually resolved by arranging for the schools to refer their students to their local office of the

state vocational rehabilitation agency. The linkage developed between Project MEAL and Vocational Rehabilitation resulted in the referral of those clients who needed transition services to the project.

#### Obtaining Documentation of the Clients' Handicaps

Uncertainty about the availability of funds to pay for the training of many of the rehabilitation clients made it impossible to determine if a client would enroll in the project until the last minute. It was necessary, in a number of cases, to admit such clients on the basis of an oral report of the evaluations conducted by the referring agency.

It was sometimes difficult to obtain the documentation that was to follow these oral referrals. This problem was gradually resolved as the relationship with these agencies developed.

#### Operating A Residential Living Center

Operation of a residential living unit for learning disabled and other handicapped adults was the greatest source of difficulty during the project. While these problems were much like those found in any group residence where young adults live, they proved to be very demanding upon staff time.

In many cases, the clients who moved into the residential living unit were experiencing their first taste of living away from home. Their newly found freedom combined with the pressures associated with living in an apartment with three other persons is often difficult for clients to handle. Some clients require considerable assistance in learning how to get along with others and in learning to do their share in caring for the apartment, preparing meals and maintaining themselves. Development of these skills was emphasized in the core training curriculum. Use of the residential unit as a laboratory for the training program made it necessary for the clients to be in the process of applying newly learned skills on an ongoing basis. Doing so was found to be unsettling for some clients.

Housing a population that is involved in making major attitude and behavioral changes following years of anxiety-ridden school attendance and job failure involves many problems. Some clients tended to take this anxiety out by slamming doors, hitting walls, etc. The physical damage to the facility that occurs in these cases can create considerable unanticipated maintenance expenses. Those planning to operate residential living units should include a greater than usual amount of funds for facility maintenance.



### Liability Insurance

The rapid escalation of liability insurance premiums during the project created an unanticipated drain on the budget. Such insurance is a must for those who intend to offer training and housing for "at risk" adults.

### Creation of a Pool of Hard-To-Place Individuals

Those who plan to develop a post-secondary transition service program should be prepared to face the reality that they will not be able to succeed in moving all clients from the training phase of the program into full-time employment. They should also realize that the nature of the jobs and job market are not always conducive to continued employment of these individuals.

Those who fail to get or keep their jobs can require continued services over a much longer period of time than anticipated. These services require additional staff time, often at the very time when plans suggest the staff members will be available to work with new clients that have been recently admitted to the program.

It is entirely possible that a pool of clients who are difficult to place and keep on jobs will develop in the residential living unit as the program matures. These clients who are often those with the most complex problems tend to want to stay in the residential living unit while those who are successfully employed are able to move into apartments near their jobs. Failure of a portion of the clients to move on to independent living outside the residential living unit can create problems of space availability as new clients are admitted to the core training program.

### Staff Burn-Out

Conducting a post-secondary transition program like Project MEAL is very demanding on the time and energies of the staff members. Those who anticipate 8:00 A.M. to 5:00 P.M. working hours with regular breaks should not attempt to operate this type of program. Those who have a strong need to have everything happen where and as it is scheduled should carefully review their motives and suitability for involvement in such a labor and interpersonal relationship intensive activity.

Staff burn-out must be anticipated and guarded against before the first client is admitted to a transition service program like Project MEAL.

### Lack of Time For Marketing

The extensive demands on the time of staff members that are required to operate a transition service program like Project MEAL leave little time for selling the program to others. The conflict between the demands involved in providing day-to-day services to clients who were already admitted with the need to be actively involved in developing and maintaining linkages and marketing the services offered by Project MEAL were particularly problematic. Ideally, one staff member would be assigned to spend most of his or her time in this activity. The practical aspects involved in operating with a limited budget made it difficult to perform both of these tasks without slighting one.

### Cash Flow

Those planning to develop a post-secondary transition program for handicapped youth which is supported in large part by funds from other agencies such as vocational rehabilitation face an immediate cash flow delay. The costs of operating the program begin accumulating even before a client enrolls in the program and continue through the clients' stay in the program. Staff members and suppliers of food, utilities and consumable materials and rent for the clients' housing have to be paid for on a regular basis. Payment from most sponsors other than parents are based on services rendered. These funds usually are not forwarded to the R&D Training Institutes until the clients complete their training.

This discrepancy between the time when the costs of services must be paid out and the time when reimbursement is received can quickly lead to the early demise of marginally funded transition service programs. The cash flow discrepancy can be eased somewhat by negotiating contracts with sponsoring agencies that provide partial payment at intervals during the clients' enrollment in the program.

### Documentation of Service Delivery

It was often difficult for staff members to find the time needed to record the documentation needed to verify each client's movement through Project MEAL. This was largely due to the ongoing need for the staff to be actively involved in the delivery of direct services to clients and the need for them to be actively involved with the clients.

The series of check sheets that appear in this report were prepared to facilitate documentation of critical activities involved in each client's training program. Use of a check sheet format greatly reduced the staff time needed for documentation of services and client progress.

### Staff Turnover

The high stress involved in providing services to clients who have long histories of dependency on others and repeated academic and/or job failure tends to accelerate job burn-out and staff turnover. The sudden resignation and departure of the secretary who was in charge of operating the computerized case management system used at the R&D Training Institutes for Project MEAL created several weeks of difficulty in accessing this data base. Whenever possible, more than one staff member should be proficient in entering and retrieving data from systems of this type.

## Chapter 12

### Case Management System

A computerized case management system was developed and field tested during Project MEAL. Systematic, computerized data storage and retrieval became necessary as the number of clients being served by Project MEAL and other R&D programs increased. The Smart Data Base Manager (1986) software package developed by Innovative Software, Inc., of Lenexa, Kansas, was used in designing and operating this IBM-PC based management system.

The forms presented throughout this report were used to gather the information which was entered into the case management system. These forms were designed so that staff members could quickly check off the necessary indicators of problems or progress with minimal expenditure of staff time. The paper and pencil records were kept as a backup for the computerized system.

The design of the case management system included space for entering a wide range of information about each client. The software package makes it possible to conduct sorts for each type of information or combinations of information. For example, printouts can be generated which list those clients who are receiving skill training, assigned to a case manager, on medication, etc.

A copy of a printout of the case file for one of the R&D Training Institute clients appears on the following pages.

R&D Training Institutes, Inc.  
Life Development Institute  
Case Management System

Name

---

Last, First [REDACTED]  
Client Number [REDACTED]  
DVR Client # [REDACTED]  
Date of Birth [REDACTED]  
Soc. Sec. Num. [REDACTED]  
Address [REDACTED]  
City [REDACTED] State AZ Zip [REDACTED]

Status

---

Referral 1 Active N On Hold  
Closed 07/20/87  
R & D Grad 06/26/87

Intake

---

Referral Recvd 06/06/86  
Referral Source DVR  
Interviewed 06/17/86  
Psych Eval Cmpl 04/10/86  
Voc Eval Cmpltd 04/10/86  
LDI Acceptance 06/17/86  
Enter Core Prog. 07/07/86  
Referral to DVR 00/00/00

Other Referrals SWBIRA FOR VOC TRAINING

Notes

Parents

---

Last, First [REDACTED]  
Phone (602) [REDACTED]  
Address [REDACTED]  
City [REDACTED] State AZ Zip [REDACTED]

Contacts

---

Case Manager ROB CRAWFORD  
Emergency Contact FATHER  
Emergency Phone (602) [REDACTED]  
DVR Counselor [REDACTED]  
DVR Counselor # [REDACTED]  
DVR Unit 310D  
Phone (602) [REDACTED]  
Others

## Financial Responsibility

---

DVR Y NVR Parents Y OSVR Self  
Insurance Ins. Company  
Corporate Which Corp.  
Fell Grant

Core Training:	Who DVR	Begin	07/07/86	End	09/06/86
	Food: Who PARENTS	Begin	07/07/86	End	04/30/87
Post Sec Prep:	Who	Begin	00/00/00	End	00/00/00
	Housing: Who PARENTS	Begin	07/07/86	End	04/30/87
	Tutoring: Who	Begin	00/00/00	End	00/00/00
Transportation:	Who	Begin	00/00/00	End	00/00/00
Skill Training:	Who SWBIRA	Begin	09/15/86	End	04/23/87

Other

## Insurance

---

Health Ins. Co. BLUE CROSS/BLUE SHIE  
Policy # [REDACTED], GROUP #0002  
Car Ins. Co.  
Policy #

## Car

---

Make  
Model  
Year  
Serial #

## Disability

---

Primary LEARNING DISABILITIES/LOW FUNC  
Other

## Program

---

Training Group 07/07/86  
9 Week Prog: Entry Date 07/07/86 Date Closed 09/06/86  
Post Sec Prep: Entry Date 00/00/00 Date Closed 00/00/00  
Project MEAL: Entry Date 09/15/86 Date Closed 01/23/87

## Medication

---

Med Name(s) NONE  
Self Mgt. R & D Mgt.  
Physician  
Family Physician [REDACTED] M.D.  
Phone (602) 774-7345

## Legal Problems

---

Record  
Problem  
Probation/Parole: Begin 00/00/00 End 00/00/00  
Probation Officer.  
Prob. Off. Phone (000) 000-0000  
Report on file  
Restitution Fee  
Monthly Rest Amt  
Restitution Date 00/00/00

## IETEP

---

Completed 07/14/86  
Revision Dates  
Notes

## Core Program

---

Entry 07/07/86  
Cmpl Level I 07/18/86  
Cmpl Level II 08/15/86  
Cmpl Level III 09/06/86  
Cmpl Level IV 09/06/86  
Core Prog Grad 06/26/87  
Termination 00/00/00  
Term. Reason

## Tutoring

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Tutor  
Began 00/00/00  
Ended 00/00/00  
Problem  
Notes

## Job Development

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Job Developer GEORGE ROYBAL  
Plan SEE IETEP

Plan Completed 07/14/87  
Revision Dates  
Notes

## Job Placement

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Job #1 10 KEY OPERATOR  
Date Placed 05/04/87  
Date Ended 00/00/00  
Reason Ended

Job #2  
Date Placed 00/00/00  
Date Ended 00/00/00  
Reason Ended

Job #3  
Date Placed 00/00/00  
Date Ended 00/00/00  
Reason Ended

## Training

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Training Plan ATTENDING MARICOPA SKILL CENTER - RETAILING CASHIER/BANKI  
PROGRAM

Began 09/15/86  
Ended 04/23/87  
Reason Ended GRADUATED

## Job Tracking

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Job Tracker JEFF CLAUSSEN  
Client's Job 10 KEY OPERATOR  
Company [REDACTED]  
Pay Rate 5.28/HR  
Supervisor CATHY  
Start 05/04/87  
Percent Time 100  
Termination 00/00/00  
Reason Termed  
Notes



## Chapter 13

### Evaluation of Project Effectiveness

By Dr. Larry A. Faas  
Project Evaluator

This evaluation is based upon a review of the Project MEAL training sequence, files of the clients who were served by the project, documentation of services, training and job successes of those who were enrolled in the project. It is also based on observations made during visits to project classes, staffings, staff meeting, assessment team meetings, advisory board meetings, and information gathered during interviews with project staff members.

#### Population Served

Review of the histories and evaluation reports of the Project MEAL clients indicated that the clients were high risk individuals with learning disabilities and related problems. Enrollment in the project appears to have been a last chance for many of these clients who had failed repeatedly in various jobs and other rehabilitation and training programs. Admission of many of these clients involved considerable risk.

#### Curricular Effectiveness

The core training program curriculum was defined, field tested, refined and found to be effective. Major attitude changes and improvements in employability skills were noted as a result of participation in the project.

#### Tutorial Program Effectiveness

Major problems were encountered in this area in terms of scheduling and the need for such a wide range of materials that the cost of their procurement would have been prohibitive. The scars created by years of academic failure during the clients' school years was very apparent in the open reluctance of many of the clients to participate in anything that looked like school.

The most effective strategy used during tutoring sessions conducted at the project site involved concentrating on tasks identified by the clients as their areas of need. The resistance to academic tasks selected by the tutor disappeared when remedial assistance focused on problems clients identified.

The most effective tutoring occurred while clients were enrolled at the Maricopa Skill Center. This assistance which was provided in the center's Learning Center focused on academic problems identified by instructors in the skill development

classes. Clients readily accepted this assistance when it became clear to them that development of these job-related skills was needed for their job success. The resistance to tutoring and remedial materials availability problems were effectively resolved by development of the linkage with the Learning Center.

#### Participation in Project MEAL

Forty-one clients were admitted to Project MEAL. The status of these individuals on September 30, 1987, was as follows:

Status	#	%
Completed Program	25	61.0
Terminated	11	26.8
Still Active in Program	<u>5</u>	12.2
Total Admitted	41	

Eighty-three percent of the subjects had completed Project MEAL or were continuing in R&D Training Institute programs on September 30, 1987, when the project officially ended.

#### Reasons Clients Left or Were Terminated

The reasons clients who did not complete Project MEAL prior to exiting the program were as follows:

Reason	No. of Clients
Left to have surgery	1
Medical Problem	1
Substance Abuse	1
Homesickness	3
Legal Problem	1
Experimental Admission That Didn't Work Out	1
Emotional/Behavior Problem	<u>3</u>
Total	11 (26.8%)

One of those who left the program was a Native American client who returned to his home reservation where he obtained employment. Another who was homesick returned to her out of state home.

### Effectiveness of Job Placement

Examination of the effectiveness of the job placements of the 25 clients who had completed Project MEAL indicated that their employment status on September 30, 1987, was as follows:

<u>Employment Status</u>	<u>#</u>	<u>%</u>
Employed	23	92
Continuing Training	1	4
Looking For A Job	<u>1</u>	<u>4</u>
Total	25	100

The average wage of the 23 employed clients who completed Project MEAL was \$4.78 per hour. The six clients who exited the project before completing it, who were employed were earning an average of \$4.64 an hour.

The employment status of the 11 clients who exited Project MEAL prior to completing the program was as follows on September 30, 1987:

<u>Status</u>	<u>#</u>	<u>%</u>
Employed	6	55
Student Community College	1	9
Unemployed	2	18
Lost Contact With Client	<u>2</u>	<u>18</u>
Total	11	100

Number of jobs held since completing Project MEAL is shown below for the 23 clients who were employed on September 30, 1987:

<u># Of Jobs Held Since Completion</u>	<u># Clients</u>	<u>%</u>
One	13	57
Two	8	35
Three	<u>23</u>	<u>8</u>
Total	23	100

### Overall Effectiveness of Project MEAL

Review of the accomplishments of Project MEAL indicates that an effective post-secondary transition model for learning disabled adults has been developed and field tested. Its use with high risk clients who had histories of repeated failure and unemployment resulted in a 92% successful placement and employment rate among program completers.

The high success level found among clients who completed Project MEAL indicates that the employability of unemployed learning disabled adults can be changed dramatically through training provided after exiting high school. The Project MEAL model is recommended for replication.

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